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Equivalence in the Swedish education system:

An investigation of 'equivalent education' and its impact on schooling and teachers' identity in upper-secondary education

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Equivalence in the Swedish education system: An investigation of 'equivalent education' and its impact on schooling and teachers' identity in upper-secondary education

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Abstract

This research investigates the extent to which the traditional egalitarian values of Swedish education can be retained in a market-oriented school system. In particular it focuses on the concept of 'equivalent education' and its impact on schooling and teacher identity in Swedish upper-secondary education.

The 1992 Swedish School Voucher Reform marked an important shift in education policy, allowing any individual or organisation to apply to start a school and, if successful, to receive public funds from municipal school budgets. The intention was that a more diverse and competitive system would drive improvement in national and international comparisons and cost-effectiveness, while banning fees and selection would preserve egalitarian principles. However, some commentators have argued the changes have increased segregation and the new focus on 'equivalence' has downgraded commitments to equality.

This research explores how upper-secondary schools construct and enact equivalence, the implications of these constructions and enactments for teachers' professional roles and identities, and their implications for the central values of Swedish Education.

These issues are explored through case studies of two upper-secondary international schools in Stockholm. Methods include: interviews with staff; observations of school activities, pedagogical approaches and assessment; reviews of national and school policy documents and reports; and analysis of national statistics on school populations and results. The exploration is theoretically located within policy sociology, social constructionism and analytical tools drawn from critical discourse analysis.

The study shows that equivalence is interpreted differently in the case study schools, resulting in radically different organisational structures and approaches to curriculum delivery and pedagogy. It illustrates how policy reform has created new, narrower, notions of quality, based on attainment under a revised assessment regime and suggests that diversity and competition have weakened collective professional identities and ties. The study argues that these developments represent a serious challenge to traditional Swedish commitments to solidarity and an equal education for all.

Table of contents

List of tables	7
List of abbreviations	8
Chapter 1 – Introduction	9
1.1 Equivalent education	13
1.1.1 Research questions	17
1.2 Analytic approach	18
1.2.1 The importance of language	18
1.2.2 Policy sociology	19
1.3 Summary and structure of the thesis	20
Chapter 2 – Context setting	23
2.1 Introduction	23
2.2 Constructing equality	23
2.2.1 Intrinsic and instrumental reasons for valuing equality	24
2.2.2 Equality in education	25
2.3 Distributive equality	25
2.3.1 Equality of education opportunity and equality of outcome	26
2.3.2 Equality of resources and equality of welfare	27
2.4 The capability approach	29
2.5 Equality of education opportunity in the Swedish comprehensive system and the Coleman Report	31
2.5.1 Equality and social justice in early Swedish curricula	33
2.6 Recent challenges to equality in education	35
2.6.1 Equality and market-oriented education	37
2.7 Output culture and quality assurance in international trends in education	38
2.8 Responsibilisation and self-regulating citizenship	42
2.9 Conclusions	45
Chapter 3 – Theoretical and methodological considerations	48
3.1 Introduction	48
3.1.1 Theoretical approaches	48
3.1.1.1 Social constructionism	49
3.1.1.2 Critical Discourse Analysis	50
3.1.1.3 Policy sociology	50

3.1.2 A qualitative approach	52
3.1.3 Case study research	54
3.2 Research validity and generalisation	55
3.3 Study design and implementation	57
3.3.1 Secondary sources	57
3.3.2 Case study municipality and schools	58
3.3.3 Sampling	59
3.3.4 School visits	61
3.3.5 Field notes	61
3.3.6 Interviews	62
3.3.7 Informants	64
3.4 Data Analysis	65
3.4.1 Applying Critical Discourse Analysis to data analysis	66
3.5 Ethical considerations	68
3.5.1 Consent	69
3.5.2 Ethics and power relations	70
3.5.3 Reflexivity and value neutrality	73
3.6 Conclusions	75
 Chapter 4 – Swedish education policy: 1950-2011	 76
4.1 Introduction	76
4.2 Swedish education policy and the introduction of the Voucher Reform: an overview	76
4.2.1 1920-1950. The introduction of the nine-year comprehensive school	77
4.2.2 1950 – 1975. The Swedish comprehensive school system	79
4.2.3 1975 – 1990. First attempts at decentralisation	81
4.2.4 1991 – 1998. Peak of decentralization	82
4.2.5 2000-2012: coexistence of municipal and independent schools	86
4.3 Document analysis	90
4.3.1 1969-1988: <i>equivalence as respect for students' individuality</i>	90
4.3.2 1989-1993: <i>equivalence as enhanced individuality</i>	93
4.3.3 1994-1996: <i>equivalence as attainment of national goals</i>	97
4.3.4 1996 – 2003: <i>equivalence as enhanced flexibility of school management</i>	100
4.3.5 1999 – 2012: <i>equivalence as re-regulation through quality assurance</i>	101
4.4 Conclusions	104

Chapter 5 – Equivalence and internationalisation in six Stockholm schools	107
5.1 Introduction	107
5.2 The upper-secondary school market in Sweden and the Stockholm municipality	109
5.3 Internationalisation in education and in the Swedish curriculum	110
5.3.1 Instrumental and transformative constructions of internationalisation	111
5.3.2 Internationalisation in the Swedish curriculum as transmission of values	112
5.3.3 Internationalisation in the Swedish curriculum as enhancing mutual understanding	116
5.4 The six sample schools	118
5.5 School <i>continuum</i> and presentation of themes	121
5.5.1 Citizenship apprenticeship	122
5.5.2 School leadership and organisation	125
5.5.3 Role of teachers	128
5.5.4 Pedagogy	130
5.5.5 Assessment	133
5.5.6 Work environment and attendance	134
5.6 Conclusions	136
 Chapter 6 - Organizational practices and branding identities	 138
6.1 Introduction	138
6.2 Case study schools	139
6.2.1 Parkview	140
6.2.2 Stoneville	143
6.3 School identity: the English-Swedish dichotomy in the light of the Swedish curriculum	147
6.3.1 Parkview: ‘the organisation’ and the tradition of Swedish education	149
6.3.2 Stoneville and the English tradition	152
6.4 School models for different student populations	155
6.5 Conclusions	159
 Chapter 7 - Managerial flexibility and quality assurance	 162
7.1 Introduction	162
7.2 Parkview: organization’s interest vs. teachers’ interest	162
7.2.1 Parkview, management and IT	164
7.3 Stoneville, entrepreneurial success and the management-teacher relationship	166

7.4 Quality assurance: potential tensions within equivalent education	170
7.5 The Swedish inspection system	172
7.5.1 The inspection system and the example of Stoneville	174
7.6 Conclusions	175
 Chapter 8 - Equivalent education and the new assessment framework	 177
8.1 Introduction	177
8.2 The discourse on quality and assessment	179
8.3 Equivalence as delivered through common assessment practices	183
8.4 Assessment and central state support	187
8.5 Schools and assessment models	190
8.6 Competition among schools and fair grading	192
8.7 Conclusions	195
 Chapter 9 - The role of the teacher	 198
9.1 Introduction	198
9.2 Teacher autonomy	201
9.2.1 Parkview	201
9.2.2 Stoneville	204
9.2.3 Teaching as an individualised profession	206
9.3 Workload and opportunities for decision-making	209
9.4 Professional ambition	214
9.5 Conclusions	215
 Chapter 10 – Conclusions	 218
10.1 Introduction	218
10.2 Research questions and the importance of policy context	222
10.3 How do upper-secondary schools construct and enact equivalence?	224
10.3.1 Equivalence as common approach to marking	225
10.3.2 Equivalence and new school management	227
10.4 What are the implications of these constructions and enactments for teachers' professional roles and identities?	230
10.4.1 Service based identity: the teacher as assessor	232
10.5 What are the implications of schools' constructions and enactments of equivalence for the central values of Swedish education?	233
10.5.1 Education in service of the knowledge economy	235
10.6 Conclusions	238

Appendix 1 – Email to school principals	242
Appendix 2 – Information sheet	243
Appendix 3 – Sample questions for interviews	244
Appendix 4 – Informants	245
Appendix 5 – Sample of field notes analysis	246
Appendix 6 – Sample of interview analysis	249
Bibliography	251

List of Tables

Table 1 – Word count: equality/equivalence in Swedish education policy documents	104
Table 2 – Summary of sample schools' characteristics	120
Table 3 – Grade descriptors (2011)	187

List of Abbreviations

CDA	Critical Discourse Analysis
CPD	Continuous Professional Development
DIR	<i>Kommittédirektiv</i> [Committee Report]
DsU	<i>Departementsserien och promemorior – Utbildningsdepartementet</i> [Summary of consultation / Discussion Paper – Department of Education]
EU	European Union
ICT/IT	Information (and Communications) Technologies
Lgr	<i>Läroplan för grundskolan</i> [Curriculum for compulsory school]
Lpo	<i>Läroplan för det obligatoriska skolväsendet förskoleklassen och fritidshemmet</i> [Curriculum for compulsory school, preschool class and the leisure-time centre]
MOU	<i>Medborgarnas offentliga utredningar</i> [Citizens' Public Enquiries]
OECD	Organisation for Economic Co-operation and Development
PISA	International Programme of Student Assessment
Prop.	<i>Proposition</i> [Government Bill]
SAF	<i>Svenska Arbetsgivareföreningen</i> [Confederation of Swedish Employers]
SEN	Special Education Needs
SFI	<i>Svenska för invandrare</i> [Swedish for immigrants]
Skr.	<i>Skrivelser</i> [Government development plan]
SOU	<i>Statens Offendliga Utredningar</i> [State Official Reports]
TIMMS	Trends in International Mathematics and Science Study

Chapter 1

Introduction

The Swedish School Voucher Reform of 1992 dramatically changed the education landscape of a country traditionally based on egalitarian and communitarian values. From 1950 to 1975 the Swedish comprehensive school system was regarded as a fundamental part of attempts by successive governments to create a more equal and fair society. Across a whole host of social policy areas, including education, strong state control was considered crucial to securing this outcome. A commitment to equality and fairness was reflected in the maintenance of an extensive public sector, including numerous welfare programmes and a system of progressive taxation. During this period, Sweden was ranked highly in cross-country comparisons of wealth distribution. However, for the past 30 years, the Swedish state, including its education system, has undergone a transformation in public administration, involving processes of marketisation, decentralisation and re-regulation (Björklund et al., 2005; Dahlstedt, 2009; Lindgren, 2015).

The aim of this research is to investigate to what extent the founding egalitarian values of Swedish education can be maintained in a market-oriented and decentralised school system. The research has a particular focus on the concept of 'equivalent education' (*likvärdig utbildning*), which has gradually replaced 'equal education for all' (*jämlik utbildning för alla*) as a central discourse in policy documents since the 1980s, and its impact on schooling and teacher identity in Swedish upper-secondary education.

The implications of marketisation, decentralisation and equivalent education for social mobility have not yet been determined; most research suggests more time will be needed to reach clear conclusions on this topic. However, equivalence also impacts other aspects of education, such as: the way social and cultural capital is constructed by different schools; student and staff identity; representations of cultural diversity; notions of citizenship; pedagogical approaches and assessment models. This study explores these aspects of equivalence through an examination of local education markets in the city district of Stockholm. It explores how different local actors working within two case study international upper-secondary schools navigate the potential opportunities and challenges posed by equivalent education.

Gewirtz et al. (1995) alert us to considerable differences between governments in their use of the market and its principal mechanisms, choice and competition, to try to drive up standards in education. Choice and competition depend on the existence of more than one school, relative population density and good access to transport. This research considers the implications of legislating for choice in Stockholm, the municipality with the highest number of independent upper-secondary schools in Sweden and therefore the place in which market-oriented policies might be expected to have the greatest impact.

The research aims to complement and build on existing research on the Swedish school market and teacher professionalism. The shift from equality to equivalence, at the core of this study, has been extensively researched by Thomas Englund (1994a, 1994b, 2005 and 2010) whose work has been particularly formative in shaping the policy analysis at the core of this research (set out in Chapter 4). In his use of Skinner's methodology, Englund (1999a, 2005) shows how 'equivalence' has shifted from a concept unmistakably associated with equality, to having a range of new meanings. The Voucher Reform and the equivalent model (which was also shaped significantly by the 1994 National Curriculum, or *Lpo94* – see Chapter 4) created the conditions for a flexible model of education based on the initiative of individual providers. This flexible model led to a number of tensions. For example, the Voucher Reform placed great emphasis on parental involvement in children's education and on freedom of choice, which led to the establishment of numerous faith and ethnic schools. However, at the same time the curriculum stated that equivalent Swedish education had to be founded on values belonging to the Western, Christian tradition. Such tensions and incongruity, highlighted by Englund, are carefully considered in this research (Chapters 4 and 5).

This study also builds on research concerned with the processes of de-regulation and re-regulation that the Swedish education system, and other policy areas, has been going through over the past 20 years (Chapter 2). New assessment policies, audits and inspections have shifted responsibility for results on to individual members of school staff (Perryman, 2009; Reid, 2009; Segerholm, 2009; Ek, 2012; Rönnerberg, 2012 and 2014; Lindgren et al., 2012; Lindgren, 2015), as part of a larger governance discourse aimed at transforming schools into self-regulating systems. In turn, the state has shifted its role from service provider, to one of monitoring standards and setting minimum benchmarks (Dahlstedt, 2009; Hultén, 2013). My research aims to contribute to this field of study by looking at processes of 'responsibilisation' (by that meaning devolving responsibilities from the state to

individuals) at school level and the impact these have on the construction of staff identities, curriculum delivery and institutional goal setting. In doing so, this study seeks to underline the importance of local context in policy negotiation and to highlight how policy implementation is not un-problematic but rather characterised by struggle and resistance. In this respect, the study draws on the policy sociology of Bowe, Ball and Gold (1992), which challenges traditional conceptualisations of the policy process as linear, uniform, and predictable. This point will be explained further in section 1.2, below.

In relation to the role of local context in identity construction, my work is informed by recent research on teachers' professionalism in Sweden and internationally. Teachers' autonomy in the flexible, equivalent system (Helgøy and Homme, 2007; Fredriksson, 2009; Wermke and Höstfält, 2014) and the impact of new accountability measures on the profession (De Wolf and Janssens, 2007; Svensson, 2008; Lindgren, 2015) have been the focus of much recent research work. The flexibility granted to schools in the equivalent system might seem to imply greater autonomy for teachers, but in practice such autonomy appears to be the result of negotiation and dependent on the specific ethos and approach of a particular school (Fredriksson, 2009). Indeed, in the post 1992 system, Swedish teachers appear to be constructed as employees of a particular school and enterprise (Wermke and Höstfält, 2014), rather than professionals serving the same public purpose. Despite teachers' professionalism being an area of extensive research, the majority of the most recent studies focus on primary and lower-secondary schools. Research on upper-secondary schools, which are the focus of this study, is more limited. The focus on upper-secondary schools offers the opportunity to shed new light on processes of identity formation among Swedish teachers. Upper-secondary schools are invested with the crucial responsibility of securing access to higher education or job placements for their students. This pressure to achieve results, recorded in league tables and the Swedish National Agency for Education (*Skolverket*) annual statistics, arguably impacts upper-secondary teachers to a larger extent than their colleagues in primary or secondary schools.

Finally, in its specific focus on international schools, this study seeks to complement existing research on equivalence by analysing constructions of internationalisation, the core values these constructions bring to school life, and their impact on curriculum delivery. Internationalisation is, in fact, another key concept introduced in

1994, and internationalism is a core value that schools are now expected to transmit. As it will be briefly mentioned in section 1.1, below, it has been argued that international comparisons of results from the late 1980s have highlighted a decline in the performance of Swedish education. With the entrance of Sweden into the European Union in 1995, the country was urged to embrace a new discourse of 'learning' as fundamental to the success of the national economy in international markets (European commission, 2001; Grek et al., 2009, see Chapter 2). The number of international schools in Sweden teaching the national curriculum in English and offering diplomas such as the Baccalaureate has subsequently increased significantly (*Skolverket*, 2014). However, international education in Sweden has not yet become a central theme in education research; the majority of those studies that do exist focus on the integration of students constructed as foreigners (Kallstenius, 2008; Bunar, 2010) and curriculum delivery in relation to modern foreign languages (Lahdenperä, 1999; Tornberg, 2000; Von Brömssen, 2006 and Lorentz, 2007). In focusing on international schools, therefore, this research can explore concepts of internationalisation and their relationship with equivalence, adding further layers of complexity to previous studies of the topic.

The research mentioned above focusing on constructions of equivalence, re-regulation, teacher professionalism, and internationalisation all inform this project, which explores specific case studies of two international upper-secondary schools in the municipality of Stockholm. In focusing on social relations in a particular, 'lived education market', this study complements existing research by showing how equivalence can lead to a number of different constructions of education that have a profound impact on both students' and teachers' identities, as well as the meaning of education itself.

This exploration of the impact of 'equivalent education' on school provision, assessment practices and staff identity recognises policy as both contested and as a process (Ball, 1997a; Ozga, 2000; Whitty, 2002). It examines the interaction of 'equivalent education' policies with broader socio-historical conditions and local contexts, and explores the ways in which schools, students and staff have been positioned by market discourses of choice, quality and competition. The study also traces the evolution and transfer of neo-liberal policies to show how education policies situated within international policy discourses are negotiated in local contexts.

In the remainder of this chapter I will introduce the key research questions that the research has sought to address, the analytic approach that will be deployed and the structure of the thesis. But before doing so I will briefly sketch out the key components of, and the background to, the education reforms that provide the backdrop to this study.

1.1 Equivalent education

The shift from the use of the term equality to the use of the term equivalence in policy documents, which will be analysed in more detail in Chapter 4, roughly corresponded to the implementation of the Voucher Reform. This important change in Swedish education provision meant that individual schools now had the opportunity to differentiate their pedagogical model, the working conditions of their employees and more generally their approach to the curriculum. In a nutshell, the reform allowed private enterprises to apply and, if successful, to establish schools with public funding. These new schools were financed by municipalities, with funding levels dependent on student numbers, as each student was allocated a certain amount of money by the municipality in which s/he resided. Students could choose to join a school in a different municipality and take their funding with them. The profit that enterprises could make from schools was capped at 7% per year (Björklund et al., 2005), although enterprises could increase profits by offering additional services to schools such as cleaning, IT and meals. They were not allowed, however, to charge students for any of the additional services offered.

At the beginning of the 1990s the Swedish economy faced a deep financial crisis, which led to a drastic reduction in spend on welfare and an end to traditional Keynesian policies characterised by strong central government control of the labour market and industrial and economic expansion. On this economic platform had rested a centrally-driven welfare state funded through taxation and designed to minimise social differences through provision of publically-funded services (Rothstein 1992, 1996; Benner, 1997; Huber and Stephens, 2001; Korpi, 2006; Wisselgren, 2008).

The Voucher Reform was introduced just in this period of economic recession at the beginning of the 1990s. The recession, which caused the unemployment rate to increase significantly (Bunar, 2010), awakened policy makers to the volatility of national and international markets (Larsson et al., 2012). This volatility was used as

one important rationale for introducing social policy measures designed to prepare the nation for future upheavals and uncertainties. An increasing emphasis was placed on fulfilling the requirements and the needs of a knowledge-based economy.

The Swedish welfare system had already been through a difficult period in the mid-1970s during the oil crisis, and this was followed by a decade of attempts to restore economic stability. However, it was not until the 1990s crisis that political parties and public opinion seemed to agree that the solution was a wholesale restructuring of the welfare system (Boréus, 1994; Ryner, 2002; Belfrage and Ryner, 2009). In 1991, the newly elected Conservative government announced a 'system shift' would be soon implemented (Larsson et al., 2012:3), as outlined in the report *Democracy and Power* (1990) (which will be analysed in Chapter 4 of this thesis). This political turn to the right, inspired by neo-liberal ideas, had actually begun with the 1989-90 tax reform and, even further back, in the mid-1980s, with the social democratic third way policies of the period (which included radical devaluation, deficit reduction and deregulation of financial markets) - a trend which had continued through the period of coalition with the Conservative Party (Benner, 1997; Huber and Stephens, 2001; Ryner, 2002; Larsson, 2003; Whyman, 2003).

The Social Democratic government elected in 1994 more or less carried on with the policies initiated by the Conservatives in the previous administration with its 'The Only Way' policies, including deregulation, inflation control, cuts to benefits, deficit reduction and balanced budgets in place of full-employment and income redistribution. These reforms introduced partial privatisation of public companies as well as the pension system, and provided an opening for private providers of public services in areas such as healthcare as well as education (Belfrage and Ryner, 2009; Blyth, 2001; Harvey, 2004; Huber and Stephens, 2001; Palmer, 2002; Svensson, 2001). Swedish entry into the European Union in 1995 was regarded as confirmation of the fundamental change that the Swedish economic and welfare system had undergone, as this implied international regulation of public expenditure (Jacobsson, 1997). At the time, the Swedish education system was heavily criticised for being expensive and unfit for preparing future students of higher education and professionals to enter a globalised and competitive economy. Sweden also seemed to be losing ground in international education comparisons and was attracting criticism from the Organization for Economic Co-operation and Development in Europe (OCDE, *Education at Glance*, 1989).

The Voucher Reform in education did not happen in a *vacuum*: a similar focus on competitiveness and internationalisation shaped policy changes with respect to the labour market, social housing, healthcare and language provision for immigrants (see Chapter 2). From a comparative perspective, the Voucher Reform of 1992 can arguably be considered to constitute the Swedish contribution to the school improvement movement of the 1990s (Betts and Loveless, 2005; Merrifield, 2001), which called for extensive reform to education systems in the name of efficiency and accountability.

The discourse of 'economised education' (Kenway, 1995) that now informed education content and process served to construct the prioritisation of concerns about efficiency, quality and accountability as self-evidently valid, while at the same time marginalising dissent. The concepts of equivalence and equivalent education were at the core of the Swedish Voucher Reform, apparently leaving untouched the founding values of the national education system, whilst in theory allowing for greater flexibility and enhanced effectiveness of educational provision. In the years following the reform, these ideas came to be broadly integrated in the political discourse of people of all political persuasions, encountering very little, if any, resistance in political debate or in the media (*Riksdag* [Parliament] minutes, 2007/08:98; Rönnerberg, 2014).

In the early 2000s, the Swedish National Agency for Education (*Skolverket*, 2003, 2006) presented equivalence as a means of offering flexibility in terms of managerial models and use of resources while at the same time preserving the idea of an education appropriate for all citizens. Equivalent independent schools were given total freedom to differentiate pedagogically, to employ staff and negotiate salaries locally and even to decide on timetables and time allocations for individual subjects at primary, secondary and upper-secondary school level (Rönnerberg, 2007; Helgøy and Homme, 2007; Wermke, 2013; Wermke and Höstfält, 2014).

As a result of the Voucher Reform, schools, both municipal and independent, had to compete against each other to attract students and, in contrast to the 'equal education for all' emphasised in pre-reform documents, post-reform equivalent education implicitly encouraged schools to differentiate their education offer in a number of ways. At the same time, however, from the mid-1990s to 2011 greater attention was given to mechanisms of quality assurance that could ensure the differentiated education offered by individual schools was 'equivalent for all'. Over the past 20 years, equivalence in Swedish schools has been measured in terms of

goal attainment through an increasingly centralised assessment system and through regulations regarding staff recruitment and school inspection (these topics will be analysed in Chapters 4, 7, 8 and 9).

Although the concept of equivalent education was broadly accepted and supported by all political parties, concerns were soon raised about the impact of increased flexibility on the education system (Blomquist and Rothstein, 2000; Arnman et al., 2004; and Blomquist, 2004). The impacts on segregation resulting from choice (Daun, 2003; Bunar, 2010; Gustafsson, 2006 and 2007; Böhlmark and Lindahl, 2007), increased costs (Antelius, 2007; Lindbom, 2007) and student attainment (Henrekson and Vlachos, 2009) have been researched extensively from the late 1990s, but without clear-cut results.

Following years of deregulation, and concerns raised in the studies mentioned above and in public opinion, the 2010 Education Act aimed to create a level playing ground between independent (*friskolor*) and municipal schools in terms of regulation, record keeping and accountability. At the same time further restrictions affecting both types of schools were introduced in relation to the employment and training of teachers. In 2010 and 2011, reforms of upper-secondary education and teacher training were also implemented. These reforms both had a strong focus on assessment as the principal tool of quality assurance (these reforms will be analysed in detail in Chapters 4 and 8).

Despite these changes, equivalent education continued to allow (and still allows) profound differentiation between schools. Concerns persist about the impact of equivalence on an education system that was designed to guarantee a shared, common framework for all (Beach and Dovemark, 2007 and 2009; Beach, 2010). Concerns relate to spatial inequalities (private enterprises are less likely to invest in schools outside the densely populated areas in the south of the country – *Affärsvärlden*, 2008; *Dagens Nyheter*, 2008; Lindbom, 2010; *Lärarnas Riksförbund* 2008a and 2008b, *Skolverket*, 2012a and 2012b); ethnic and religious segregation (many independent schools are faith schools – see Bunar, 2001 and 2010; Dahlstedt, 2008; Beach and Sernhede, 2011); and inequalities relating to gender and social class (although independent schools are not allowed to select students, indirect selection has been the subject of many studies - see Lundh and Hwang, 2003; Kallstenius, 2008). The quality assurance system, which steers schools through processes of objective setting and new approaches to assessment and school inspection, has also been criticised for over emphasising the responsibilities

of school managers and teachers for differences in student attainment and down-playing the role of the state and the significance of structural inequalities in society (Lahdenperä, 1999; Lindgren, 2005; Henrekson and Vlachos, 2009; Bunar, 2010).

1.1.1 Research questions

The ultimate concern of this research is to explore - through a focus - how equivalence, with its emphasis on notions of education as personal investment, and the primacy of choice, differentiation and competitiveness, sits alongside the founding values of Swedish education, which were concerned with preparing students for active democratic citizenship within a common framework of reference for all.

More specifically the research aims to explore how upper-secondary schools in the 'lived educational market' of the most populated municipality in Sweden respond to the challenges and opportunities that equivalence entails. It explores how these schools set their priorities and construct their identities in order to attract students and prepare them for a competitive higher education system and international job market, the impact of equivalent education on school practices and teacher identity, and the extent to which equivalent education can coexist with the traditional values of Swedish education, such as solidarity and equality. Recently introduced regulations on assessment and teacher employment (Chapter 4), inspection, and parents' and investors' expectations of schools (Chapters 6, 7, 8 and 9) are also explored in order to understand how professional practice and experience are changing in Swedish schools.

In order to address these aims, the research has been organised around three core questions. The first two questions focus on the interplay between national policies and the particularities of local school markets by looking at schools' constructions and enactments of equivalence and teacher roles and identities:

1. How do upper-secondary schools construct and enact equivalence?
2. What are the implications of these constructions and enactments for teachers¹ professional roles and identities?

My third question concerns the broader implications of equivalence and how equivalent schools relate to the traditional values of Swedish education, such as

¹ In the following chapters, the term 'teachers' will be used to refer to both teachers and pastoral staff in the case-study schools. In Swedish schools teachers also act as pastoral staff, by mentoring groups of students.

equality, democracy and citizenship apprenticeship. In particular, it seeks to explore whether these values have been sacrificed with the shift towards equivalence:

3. What are the implications of schools' constructions and enactments of equivalence for the central values of Swedish education?

In addressing these questions, the research draws on conceptual tools drawn from two broad analytic approaches – social constructionism and policy sociology. These approaches are briefly introduced below and discussed in more detail in Chapter 3.

1.2 Analytic approach

1.2.1 The importance of language

The analytical approach adopted in this research is based on critical discourse analysis and, more broadly, on a social constructionist theoretical framework (discussed in more detail in Chapter 3). According to social constructionism, language provides the structures in which we conceive and conceptualise reality. The analysis of language, such as that used in policy documents, is therefore central to this project. As mentioned above, according to the 2003 and 2006 *Skolverket* reports, equivalence is a more flexible concept than equality as it allows for a range of management models and local school choices, within the same overall attainment policy. My analytical starting point is that the concept of equivalence has the potential to play a significant performative function in Swedish education policy. By this I mean that the language used to discuss equivalence not only serves to describe it, but also to create and assign value to it.

Writing about Swedish education research carried out in the mid-1990s, Achtenhagen et al. (1997:186) identified 'a particular and distinctive strength in the area of 'curriculum theory', working within a tradition that relates the inner workings of schooling to the larger social and political field in which policy is formulated and realised' (cited in Englund, 2011). Popkewitz agrees that during this time there was a specific shift of emphasis towards research focused on systems of knowledge (discourses) 'as social practices' (Popkewitz, 1997:50, cited in Englund, *ibid.*). He refers to this shift as 'the linguistic turn', an expression borrowed from Rorty (1967) to reflect a refocusing of analytic thought from the objects represented by language to language itself. The present study is located within this tradition.

If, as I accept as a theoretical starting point in this research, knowledge does not exist in and of itself, but is constructed by language and through agreement about what can be called reality, then it is crucial to reflect on the possible implications of the use of particular linguistic features in the construction of education (and, indeed, of all social phenomena). We need to do this to develop a deeper understanding of the performative function of language and the way this influences how values are transmitted through communication.

1.2.2 Policy sociology

Discarding traditional positivist assumptions that depict policy decision-making as value neutral, this study aims to explore how policy has been shaped by and in turn shapes interactions between the state, economy and civil society, over time, in relation to a particular context. As already mentioned, it recognises the importance of 'a prior history' of economic and social relationships and cultural and political contexts. These elements have a considerable impact on the way policies are implemented, perceived and acted upon (Taylor et al., 1997:16).

A socio-historical perspective helps illuminate how new policies are often layered on top of pre-existing ones. Ball (1997b) warns against the risk of likening policy change to 'crossing the Rubicon', or moving from one situation before a policy change to another totally different after implementation. Indeed, as Grace asserts, 'many contemporary problems or crises in education are, in themselves, the surface manifestation of deeper, historical, structural and ideological contradictions in education policy' (1995:3). Ball's work is particularly useful in highlighting the temporal dimensions of policy analysis. He argues that a consideration of time is key in developing an understanding of policy change and asks: 'at what point is it valid to begin to draw conclusions about the effects of policy? After one year, or five, or ten?' (Ball, 1997b:9). Writing about the impact of pre- and post-1988 policy in the UK, Ball notes that such changes occur gradually over time in a way that makes them difficult to perceive, therefore 'longitudinal data which would allow for robust comparisons' are needed in policy research (Ball, 1997b:9).

This study recognises the difficulties of drawing conclusions about processes of reform and change, but attempts to present an historical overview of structural and social change while mapping the incremental nature of 'value drifts' (Gewirtz et al.,

1995). Policies are adapted and changed, representations and interpretations shift, and sources of data and key readings go in and out of fashion. To add to this complexity, policies are 'inter-textual'; ensembles of policies which may have, in combination, an impact quite different to that of a single policy enacted in isolation. This study therefore considers the existence of other policies, which may reinforce, contradict or otherwise influence the enactment of equivalence (Elmore, 1996). By locating education within the general arena of social policy, 'the impact and effects [...] of the development of multiple social markets and concomitant changes in the state' can be more fully explored (Ball, 1997b:10).

This research acknowledges, in particular, the persistent and dominant influence on the policy process of contemporary neo-liberal global discourses (and the related dominance of economic interests), and their ability to shift the education discourse, create new concepts and formulate new relationships. In his discussion of the conceptualisation of education policy in the era of globalisation, Lingard (2000) suggests adjustments to the policy cycle approach developed by Bowe and Ball with Gold (1992), which was grounded in a national context. Lingard focuses, in particular, on adjustments to the contexts of influence, text production and practice: 'Globalisation in all its forms, but certainly globalisation as mediated in the new global education policy consensus, has affected these three policy contexts and their interrelationships' (Lingard, 2000:102). While policy impacts may be unevenly experienced, 'the local, the national and the emerging global structures sit in 'mutually constitutive' relationships with each other' (Lingard, 2000:83). In this way, education policy can 'be re-read and re-articulated against the micro narratives of schools and locales' (Lingard, 2000:103).

1.3 Summary and structure of the thesis

This is a study of social relations in a 'lived education market'. It examines how schools, teachers and pastoral staff engage with equivalent education and its impact on teaching and schools in Stockholm. The study is informed by critical discourse analysis, which brings new perspectives to bear on the ways in which equivalent education and related policies both construct and are constructed by the specific context of Stockholm upper-secondary schools. The study also draws on the policy sociology perspective developed by Bowe and Ball with Gold (1992) and subsequently expanded by other researchers (for example Taylor, Rizvi, Lingard and Henry, 1997; Gulson, 2007a). This perspective challenges traditional

conceptualisations of policy as linear, uniform, and predictable. It also encourages a focus on the 'interconnectedness of social policy trajectories' with 'the enactment of 'localised' education policy changes and constructs such as the education market' (Gulson, 2007a:42).

Equivalence is connected to ideas of choice, flexibility and adaptability to different models of management, and also to ideas of quality assurance. Within current policies, schools and staff are constructed as autonomous, rational providers, conditioned by conceptions of good or responsible schooling. This study explores how equivalence is constructed in particular local contexts and how the flexibility it entails shapes the professional identity of school staff.

Having in this chapter introduced the purpose and scope of the study and the analytical approach to be taken, Chapter 2 will provide more detail of key aspects of the context for the research. It will begin with an exploration of different theoretical conceptualisations of equality, a term that has been gradually replaced by equivalence in Swedish education policy, before going on to set out the broader international and Swedish context of this research. It analyses other examples of social policy changes in Sweden and highlights some of the similarities and differences with changes in education policy, in particular in relation to decentralisation and the concept of individual responsibility. Chapter 2 also introduces the main themes analysed in the data chapters, such as international comparisons and the school improvement movement. Chapter 3 introduces the research project and outlines the theoretical and methodological rationale for the study design and approach to data generation, analysis, interpretation and presentation. The chapter also provides a reflection on the ethical aspects of the research.

Chapter 4 examines a selection of Swedish education policy documents from the 1940s on, highlighting a shift from the use of the term equality to that of equivalence. It also analyses how the term equivalence has been constructed differently over time. From Chapter 5 onwards the focus shifts from the policy context to school responses to that context, beginning in Chapter 5 with an in-depth presentation of six sample international schools in Stockholm and their particular local contexts. The chapter analyses the steering documents of these schools, highlighting their different interpretations of equivalence. The chapter locates this analysis within the discourse of international education.

Chapters 6, 7, 8 and 9 draw on the empirical data gathered as part of this study to describe and illuminate participants' experiences of equivalent education. Chapter 6 provides an in-depth exploration of the two-case study schools, focusing in particular on the construction of school identities as branding strategies related to different interpretations of equivalent education. Chapter 7 focuses on how constructions of equivalent education affect the relationship between staff and management and the tensions arising from school inspections. Chapter 8 explores the impact of new assessment policies on equivalent education and provides a contextualisation of the concept of 'quality', constructed by current policy as high scores in assessment processes. Chapter 9 reflects on the new role of teachers in equivalent schools.

Finally, Chapter 10 reviews the main themes emerging from this research project in order to suggest new understandings of equivalent education and its consequences.

Chapter 2

Context setting

2.1 Introduction

This chapter explores key concepts and policy trends that together form the context for this research. The chapter starts with a reflection on different constructions of equality, as understanding how this concept was constructed in Swedish education policy and in the curricula up to the 1980s will help us understand why it was gradually replaced with equivalence. The first part of the chapter ends with an exploration of early Swedish education curricula and their fit within the broader national policy context.

The second part of the chapter focuses on key themes and trends in Swedish and international policy that provide the context for the Voucher Reform and subsequent education policies. It starts with a reflection on the role of equality in the school improvement movement of the early 1990s and current, neo-liberal-inspired, quasi-markets in education in Sweden and internationally. It then moves on to outline international trends in quality assurance and skill-based learning, such as the Programme for International Student Assessment (PISA), which has influenced recent policies on assessment and teacher training in Sweden (and will be discussed in more detail in Chapter 4 and 8). As will be shown in later chapters of this thesis, the discourse of international comparisons and competitiveness has fuelled the expansion of international schools in Sweden.

The last part of the chapter also provides an analysis of key terms such as responsibilisation and self-regulation, setting these terms in the context of recent changes in Swedish social policy. The idea of responsibility shifting from the state to self-regulating citizens is at the heart of several of the education policy changes discussed in this thesis. The themes introduced in this chapter form the context for this research and will be discussed again in the data analysis chapters of the thesis.

2.2 Constructing equality

The shift from equality (*jämlikhet*) to equivalence (*likvärdighet*) in Swedish education policy over the past 30 years is the focal point of this research. The term equivalence and its different constructions will be analysed in detail in the following chapters. However, it is important first to explore the meaning of equality, in order to

understand why in Sweden, from the early 1980s, it was gradually replaced with a different term. Following Terzi's (2010) classification model and discussion of equality, I will try to define and summarise its different constructions and their relevance for education.

Equality in education is a fundamental principle of social justice. The Universal Declaration of Human Rights (1948) expresses this as follows:

Everyone has the right to education. [It] shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory... [and] shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, equality, tolerance and friendship among all nations, racial or religious groups and shall further the activities of the United Nations for the maintenance of peace.
(Article 46:174)

The concept of equality is central to two interrelated aspects of education: the theoretical, concerning the foundational values and goals of education; and the practical, concerning the implementation of theoretical positions in real world situations. However, despite its centrality to so much education policy discourse in Sweden and internationally, the concept is contested and subject to a range of competing theorisations and there is no simple consensus on its implications for policy and practice.

Theories of equality are concerned with how social and institutional settings determine the distribution of advantages and disadvantages among human beings (Swift, 2001:19, cited in Terzi, 2010). Such a position generates two interconnected questions. 'The first concerns *why* we should treat people as equals, and hence relates to the reasons for valuing equality in itself (Sen, 1992:12). The second question concerns *how* we should treat people as equals, namely what form of equality would best realise the equal consideration due to individuals' (Terzi, 2010:126). These two issues are interconnected, since our reasons for caring about equality will inform our understanding of equality.

2.2.1 Intrinsic and instrumental reasons for valuing equality

According to egalitarians we should care about equality 'for two interdependent reasons, which relate respectively to the intrinsic and the instrumental value of equality' (Terzi, 2010:126).

First, all notions of justice or fairness seem to be underpinned by an intrinsic simple understanding of equality: that all cases should be treated alike or at least that

inequalities should be justified by relevant reasons (White, 2006). 'Second, equality is instrumentally valuable because it is a necessary precondition of political legitimacy. In order to be legitimate in their exercise of power, governments have to enact the equal concern due to individuals' (Dworkin, 2000, cited in Terzi, 2010:127). Nevertheless, if an agreement can be reached on the question of *why* we should treat people equally, the second fundamental question of *how* we should do this is more contested.

2.2.2 Equality in education

The conception of equality as an equal right to education is at the core of many educational systems. Nevertheless, understandings of what equality actually entails are often rather vague, as well as contentious. On the one hand, 'an equal entitlement to education can be understood as implying the provision of the same schooling for all, for example through a common curriculum' (Terzi, 2010:1). On the other hand, equality in education can be seen as providing everybody with the same chance to develop and fulfill personal interests and talents, which may involve differential provision. So having an equal right to education is not the same as having the right to an equal education. While the first idea suggests an equal right to learning, the second refers to the right to a similar quality education. This distinction will be discussed in detail in subsequent chapters in relation to the Swedish case, where the increasing use of the word equivalence has signaled a shift from an equal right to be educated within a common framework, to an equal right to choose a specific form of education according to personal inclinations, circumstances and needs.

This brief discussion demonstrates the complex nature of equality. Thus clarifying the meaning of equality in education, and specifying its normative dimensions and implications, is an important ethical and political goal. For the purposes of this research, clarifying the meaning of equality in education will also help us understand the shift from equality to equivalence in Swedish education policy.

2.3 Distributive equality

Distributive conceptualisations of equality flow from liberal egalitarian theories of justice. Although these theories differ in the precise meaning they attach to the concept of equality, they understand equality as a fundamental principle of social justice. According to liberal egalitarians, society should be organised in a way that

affords equal respect to all. Liberal egalitarians are broadly concerned with the creation of fair social arrangements and, from this, a just distribution of advantages and disadvantages among people (Terzi, 2010).

2.3.1 Equality of education opportunity and equality of outcome

We might say that notions of distributive justice have had two main expressions: the first might be called *equality of opportunity*, according to which it is only when there are equal opportunities to achieve that unequal outcomes can be justified (Lynch, 1995:11); whilst the second might be called *equality of outcome*. In order for equality of opportunity to be guaranteed, equal access, participation and social rights must be present. In contrast, equality of outcome requires that specific provision is put in place to combat inequality, such as positive action programmes.

In his book *School Choice and Social Justice* (2002, analysed by Terzi, 2010), Harry Brighouse argues that equality in education implies that education has an instrumental and intrinsic value for all people. On the one hand, education provides competitive economic advantage, by enhancing opportunities to achieve a better position in and therefore to enjoy the rewards of the labour market. On the other hand, education provides fulfilling life experiences, through promoting, for example, an interest in the arts or the natural world, and is therefore intrinsically good (Brighouse, 2002).

According to Brighouse, education equality requires a 'differential distribution of resources to children with different abilities and backgrounds' (Terzi, 2010:5). Two general considerations flow from this: first, that pupils should not be advantaged because of their specific personal circumstances, including their social status and assets; and second, and importantly, children should not enjoy significant advantages due to innate aptitudes and capacities. In his analysis, Brighouse conceptualises resources in terms of opportunities. Education equality is therefore conceptualised in terms of equality of opportunity, or input, as part of a broader approach to social justice focused on fair distribution of resources (Terzi, 2010).

Cole's (1998) analysis distinguishes between equality and equal opportunity. According to this interpretation, equal opportunity attempts to increase possibilities for social mobility, but within social arrangements and settings that are fundamentally unequal. What equal opportunity tries to realise is a form of meritocracy, however this does not take into account that concepts of merit are

always shaped by a system of inequality and ideas about status, power and different ways of living. Equal opportunity policies differ in two important respects from egalitarian policies, which attempt to go further. First, egalitarians offer a thorough assessment and critique of structural inequality, both at the societal level and at the level of individual schools. Second, egalitarians are committed to creating a more just economy and fair society, in which wealth is distributed between all individuals in a just way and people are able to engage fully in democratic participatory processes.

Nancy Fraser (1997) analyses possible remedies to tackle different forms of injustice. She concludes that to 'readdress end-state mal-distribution, while leaving intact much of the underlying political-economic structure' (pages 24-25) constitutes an affirmative remedy. In contrast, 'to change the social division of labour and thus the conditions of existence for everyone' (page 25) constitutes transformative remedy. This second, more radical remedy is often associated with socialism.

Having outlined the key aspects of distributional notions of equality, the next section focuses on the objects of distribution. *What* is it that needs to be equally shared in order to achieve equality?

2.3.2 Equality of resources and equality of welfare

As highlighted in the previous sections, one important conceptualisation of equality is as equal shares of primary goods. From this perspective, 'primary goods are social conditions and resources that free and equal citizens need in order to live a complete life' (Rawls, 1982:166; 2001:58, cited in Terzi, 2010). These conditions include basic rights, for example freedom of choice of profession and movement, which provide some protection against inequalities of opportunity, power, income and wealth (Rawls, 2001:58-9, *ibid.*).

Both Sen (1992) and Nussbaum (2000 and 2006) critique this view (see Terzi, 2010), pointing out how it neglects fundamental aspects of human heterogeneity and their implications in terms of advantage or disadvantage. Further, they argue, it neglects the fundamental fact that people vary in the efficiency with which they are able to convert resources into well-being. The distribution of education resources should therefore be geared to each person's particular level of functioning, an aspect that is not acknowledged by an approach focused on equality of primary goods.

In his view of equality of resources Dworkin (2000) distinguishes between impersonal and personal resources. Impersonal resources include material goods, inherited wealth and assets, while personal resources include health, talents, and general strengths and weaknesses. Dworkin sees resources as a means of leading a fulfilling and worthwhile life, according to an individual's particular conception of what that entails (Terzi, 2010). He supports an equal distribution of impersonal and personal resources including those related to talents, but not those relating to preferences as tastes and ambitions (Dworkin, 2000:65-6, cited in Terzi, *ibid.*). Despite this attention to personal differences, for Terzi (2010) Dworkin's approach faces two criticisms. The first concerns his 'partial and rather fixed understanding of human diversity', in which abilities and aptitudes are regarded as personal and divorced from any environmental and social context. Second, such an approach overlooks the important fact that people differ enormously in their ability to convert resources into well-being, as highlighted above. This ability to convert resources also varies according to the settings and contexts individuals live in. 'An equal share of resources' does not therefore necessarily tackle this crucial variation and leaves some individuals in a disadvantaged position (Terzi, 2010).

Another approach holds that people should be equal in their levels of welfare. 'Intuitively, the concept of welfare has immediate positive connotations that relate to people's success, happiness and overall satisfaction with their own lives' (Terzi, 2010:134). This approach has been the subject of extensive critique by non-welfarist egalitarians such as Rawls, Dworkin and Scanlon, and has been further elaborated and developed by Sen (see Terzi, *ibid.*).

The major challenge with welfare approaches concerns the difficulty of providing an adequate account of people's preferences or tastes that allows for interpersonal comparison to be drawn (Clayton and Williams, 1999:448; Terzi, 2010). This relates to the subjective, and therefore questionable nature, of notions of welfare. Responding to these critiques, Richard Arneson (1989) defends a conception of equality of opportunity for welfare and attempts to resolve the problem of responsibility for tastes by determining a set of preferences that are free from morally arbitrary influences (Kaufman, 2006:5, cited in Terzi, 2010). However, it remains unclear exactly how Arneson's view can effectively avoid the problem of individual tastes.

This overview of possible ways to answer to the question of what form of equality we should consider, however brief, has suggested some important limitations in both resource-focused and welfarist conceptions of egalitarian justice, which do not appear to lead to equal consideration to all individuals.

2.4 The capability approach

Sen argues for capability as the appropriate focus of egalitarian justice and the best alternative to resource and welfarist perspectives (Terzi, 2010). In Sen's approach, capabilities are people's effective freedoms to choose among valued beings and doings. For Sen, a person's well-being, by that meaning his/her quality of life defined as 'wellness of the being' (Sen, 1992:39, cited in Terzi, 2010), is determined by what s/he can actually do and be. Thus for Sen the proper focus of egalitarian concern is in evaluating people's freedom to achieve the functionings that they have reason to value, which corresponds to their freedom to achieve well-being. At the same time, this constitutes the measure for interpersonal comparison, and the kind of equality that social and institutional arrangements should try to achieve (Terzi, 2010). Interpersonal comparison should be based on people's overall freedom to choose among sets of possible functionings, reflecting the possibility to conduct diverse types of life (Sen, 1992:40, cited in Terzi, *ibid.*).

This focus on capabilities, rather than on achieved functionings, suggests attention to people's opportunities to pursue their own objectives and to the freedom they have to do so. However, Sen argues that equality of capabilities (Sen, 1992) does not correspond to the standard concept of equality of opportunity commonly used in policy literature, and seen as the equal availability of some particular means. Instead, he maintains that 'real' equality of opportunity amounts to the equal effective freedoms to achieve valued functionings, since these identify the real alternatives that people have (Sen, 1992:49, cited in Terzi, 2010). Central to the capability approach is the concept of human heterogeneity, which directs attention to the complex interrelations between personal and external variations, as well as people's different abilities to convert resources into valued objectives (Terzi, 2010).

For Terzi (2010), it is these rich and complex dimensions that make capabilities a more appropriate standard for interpersonal comparison than resources or welfare. In contrast to equality of resources, the approach focuses on the effects that resources have for people, and hence on the actual extent of people's freedom

rather than on potential means of enabling that freedom. This approach shifts the focus on what is most important in people's life, while taking into account individual choices and responsibility for them, therefore giving a 'normatively justified subjective account that is not focused on a single, objective dimension' (Terzi, 2010:141).

Chapter 4 includes a comparison of the capability approach with the first conceptualisations of equivalence developed in the late 1970s and early 1980s in Sweden. At that time, the original distributional interpretation of the term equality in education policy began to be challenged by the notion of equivalence. This latter term implied acknowledgment of individual differences within a common framework that aimed to guarantee every pupil could reach their preferred level of functioning. By focusing on capabilities to function, Sen also highlights the crucial aspect of equality of relations between individuals as a precondition for people's freedom to transform resources in line with their preferences and needs. Such reflection extends the notion of equality from a purely distributional to a relational dimension of justice. According to Young (1990), to interpret social justice purely in terms of distributional justice is reductive. Social justice must be read and conceptualised more inclusively. While for Rawls, justice concerns the equal share and distribution of benefits and burdens, including the economic advantages derived from cooperation, it does not seem to concern cooperation itself. However, a relational conceptualisation of social justice focuses on how human relationships are structured in society and how individuals relate to each other at institutional and personal level (Gewirtz, 1998).

The first Swedish curricula, from the 1960s to the 1980s, embodied both distributional and relational conceptions of equality. They challenged traditional forms of knowledge and knowledge transmission by emphasising a child-centred pedagogy and the integration of learning experiences outside school, through the family and wider processes of socialisation. The curricula sought to neutralise differences in students' status outside the school through the creation of a comprehensive learning environment that valued each individual experience. As will be outlined in the next few paragraphs, however, this experiment did not lead to equality of outcomes, and this was one of the reasons why the distributional conceptualisation of equality came to be challenged.

Although somewhat generic, this overview allows us to contextualise the evolution of conceptualisations of equality in Swedish education policy. Against this background, in the next few paragraphs I will explore the introduction of a 9-year comprehensive school system in Sweden (1950), and the Coleman Report (1966), which was published in the United States, but which had an important impact in the post-reform years in Sweden (Husén, 1986). In doing so, I show how the concept of equality embedded in policy has shifted from one focused on equal distribution of input, to other more complex notions promising, initially at least, more radical social transformations.

2.5 Equality of education opportunity in the Swedish comprehensive system and the Coleman Report.

In *Why did Sweden go comprehensive?* Husén (1986) describes the drivers and context for the Swedish school reform of 1950. At a time of great political stability, and as part of a broader policy including the introduction of study loans, free school meals, free teaching materials and school health schemes, the reform reflected a commitment 'to teach all children with their enormous variation in background and innate ability in the same programme [and] in the same classroom' (Husén, 1986:153). In a climate of general political consensus, Labour movements and worker education organisations supported the reform as central to their efforts to guarantee equality by ensuring equal access to education regardless of students' social background or place of residence (in the towns and cities or in rural areas). Pedagogy was also given a central role in the 1950 reform. The characteristic features of the Swedish reform embodied both social-democratic principles and liberal progressive ideas about education, particularly in relation to child-centeredness and related pedagogical approaches (Hill, 2001). The new comprehensive system was supposed to transform traditional, teacher-centered pedagogy into something more progressive, which would help shape the development of democratically-minded, creative students.

Writing about the US, Coleman (1969) also considers equality of access and opportunity to be founding principles of the education system, expressed in the idea of exposure to a common curriculum and attendance at the same school, financed by local taxes. Both in Sweden and in the United States, assumptions about equality of education opportunity flourished in the post-war years prior to the oil crisis of the '70s (Husén, 1986; Hill, 2001). Both countries experienced huge expansion in

secondary and further education, as national economies were strong enough to accommodate the growing costs.

However, the idea of equality of education opportunity as exposure to the same curriculum in the same school environment was challenged by further analysis of both education systems. As the Coleman Report (1966) showed, equality of input did not correspond to equality of outcome, as differences in social and economic background were key to students' attainment. According to Coleman, the notion of equality required rethinking to reflect the effects or impact of schooling. What Coleman suggested is that children's education outcomes are determined not only by the efforts of education institutions, but also by students' background and personal resources.

Coleman's work had a dual impact. On the one hand, his focus on taking into account circumstances and conditions central to learning but beyond the school experience led to more explicit recognition of the importance of social, ethnic and gender integration. Thus his work strengthened arguments about the need to consider relational, not just distributive ideas of justice. On the other hand, by shifting attention to the outcomes of education, the preconditions were created to assess school quality on the basis of quantifiable results (this point will be analysed further in Chapters 4, 7 and 8 with specific reference to the Swedish situation). Similar reflections were taking place in relation to the Swedish system. Relatively clear assumptions that equal education inputs could guarantee fairness were being replaced with an awareness of the limits of such ideas and the consequent necessity to distinguish between equality of opportunity and equality of outcome (Cole and Hill, 1999).

A central theme emerges from this partial historical account of equality of education opportunity: education policies, and the key concepts underpinning them, do not develop in a *vacuum* but are shaped by broader social policies and political contexts. The impact of post-war education policy on equality needs to be considered in relation to a broader programme of social policies of which this was just one part. Writing about Sweden, Husén (1986:162) states that the policy of equal opportunity in education did not succeed, as it was not accompanied by wider societal efforts to tackle social inequality. In his concluding remarks he says that:

Reforms have to be conceived in a wider, socio-economic context. [...] Reforms have to take into consideration the entire ecology of interdependent educative influences. Schooling is only one of these.

Changes in school practices have to be coordinated with broader social changes.

Before moving on to the second part of this chapter, where some major challenges to equality in education will be discussed, it is important to explore how early Swedish curricula actually constructed equality and sought to challenge social injustice. This exploration will aid understanding of the impact of curriculum changes from the 1990s, not only on the shape of the school system, but on ideas about the purpose of education and schooling too.

2.5.1 Equality and social justice in early Swedish curricula

Writing about traditional hierarchies of knowledge, Connell (1994) suggests that both from a social justice and an epistemological perspective traditional forms of curriculum should be replaced with a new one underpinned by the foundational principles of social justice:

This strategy accepts the need for a program of common learnings in the school, but does not accept the basis on which common learnings are currently constructed. The strategy seeks a way of organizing content and method which builds on the experience of the disadvantaged, but generalizes that to the whole system, rather than confining it to an enclave. The strategy thus seeks a practical reconstruction of education which will yield relative advantage to the groups currently disadvantaged.

(Connell, 1994:38)

The 'democratic' curriculum described by Connell appears broadly similar to the curriculum implemented in Sweden in 1962 (*Lgr62*) and revised first in 1969 (*Lgr69*), and again in 1980 (*Lgr80*), resulting in a more evidently instrumental version (discussed further in Chapter 4). Rather than being centered on traditional academic subjects, the three curricula were organised into areas of interest reflecting current social, cultural and environmental issues deemed to be relevant to pupils' lives. All three curricula sought to create a comprehensive and democratic school environment in which all pupils could participate and where they could learn how to contribute to society as future citizens. The three curricula conceptualised equality first in distributional terms (1962), and later also in relational terms (1969 and 1980), with a focus on equality of resources and opportunity for all.

These initial Swedish curricula explicitly sought to fashion a comprehensive and challenging education environment in which future citizens could engage with topics that were relevant to them. In this sense, the Swedish school of the 1960s fulfilled what in *Democratic schools* Michael Apple and James Beane (1995) identify as the

main task of schools: to reconstruct dominant forms of knowledge in such a way that they support, rather than hold back, less advantaged members of society. For Apple and Gandin (2013) Porto Alegre in Brazil represents one of the most relevant case studies of an education system fashioned along these lines. There, the Worker's Party has implemented measures such as participatory funding and the citizen school that have furthered democratic principles in a climate generally dominated by neo-liberal ideas. The Porto Alegre experiment, although realised in extremely different circumstances, is mentioned here as it can be considered a powerful alternative model of how the founding values of the Swedish curriculum could have been implemented, which contrasts with the way the curriculum actually developed in practice.

As has been outlined in this chapter, equality in Swedish education policy in the 1950s and early 1960s was constructed in terms of equality of opportunity, and understood in terms of resources, access, and exposure to a common curriculum. This approach evolved in the late 1960s to take greater account of relational notions of justice and challenge traditional models of knowledge. However, the Swedish education system struggled to achieve equality of outcomes, as school reforms were not fully matched with reforms in other social policy areas. This failure was among the factors that paved the way for initial attempts to reform Swedish education in the early 1980s. The term equality, in its distributional meaning, was gradually replaced by equivalence which, as will be shown, was initially constructed as equality of capabilities. This early construction of equivalence allowed space for a relational dimension of equality in school practices, as well as for nuanced considerations related to contextual opportunities and student needs. However, the term underwent further evolution in the 1990s with the implementation of the Voucher Reform. This will be the focus of Chapter 4.

Having analysed different conceptualisations of equality and their implications for Swedish education, the second part of this chapter highlights some themes that will recur in future chapters of this thesis. These themes relate to key policy trends in Sweden and internationally, and the ideas and concepts that underpin them. I begin with an exploration of how the idea of equality in education came to be challenged internationally from the 1990s through the school improvement movement. This movement questioned not only the organisation of schools, but also their purpose and function in society.

2.6 Challenges to equality in education

Echoing comments from Husén, Richard Hatcher (2000, 2001) has noted that the introduction of comprehensive school systems (driven by distributive notions of equality) has not substantially challenged differences in attainment between social classes. An analysis of the content of education therefore becomes central, in order to identify potential mechanisms of exclusion inherent in the curriculum that may be disadvantaging certain groups.

Meiksins Wood (1990) argues that even if we attempt to design a just society that recognises differences but does not transform them in relations of inequality, the idea of class inequality will not be eliminated (in contrast to inequality on gender or ethnic lines). Thus 'while all oppressions may have equal moral claims, class exploitation has a different historical status, a more strategic location at the heart of capitalism' (Wood, 1990:77).

Despite these concerns, from the 1990s equality has been marginalised in public policy in favour of the pursuit of efficiency and results as part of the so called school improvement movement (Slee et al., 1998). Against a background of alleged widespread school failure in terms of results and costs, the school improvement movement (focused on education practice) and the effective school movement (focused on education research) examined school-based factors, such as strong leadership and a climate of high academic expectations, which were thought to positively influence learning outcomes (Edmonds, 1979; Lezotte, 1991).

The school improvement movement and effective school research were widely adopted in the early 1990s by policy-makers in many countries who were concerned to address alleged failures in publically funded education (Barber, 1995 and 1996; Mortimore, 1995; Reynolds and Farrell, 1996). However, discussing the 'dismissive' and 'despairing' debates about state education in the US, Rose (1995:2) argues that accounts of supposed deficiencies in education rarely take into consideration the complexity of schools and their structural circumstances. From this perspective the presumed deficiencies of the education system undermine and trivialise

one of the nation's most significant democratic projects. [They create] a mood of cynicism and retrenchment, preparing the public mind for extreme responses: increased layers of testing and control, denial of new resources—even the assertion that money doesn't affect a school's performance—and the curative effects of free market forces via vouchers and privatization.

One particularly powerful critique of the school improvement movement centres on the idea that it overemphasises the actual potential for schools to tackle social and economic inequalities. Writing about the UK, Mortimore and Whitty (1997:9), suggest that the effect of school improvement work on the relative performance of schools in deprived areas has been null, as although their absolute performance has improved, so too has the performance of schools in more affluent areas, leaving the education gap between social groups unchanged. However, while it is crucial not to underestimate the fundamental role that social status plays in terms of student attainment, it is also important to recognise that social class is not the only factor that determines attainment and that education can still play a transformative role in society. Significant inroads can be made into class inequality in schooling even in the context of a profoundly unequal economic system, but doing so requires more radical education policies than those of the mainstream 'school improvement' movement, as the Porto Alegre case demonstrates.

In *Affective Equality* (2009) Lynch et al. challenge the neoliberal ideas that schools resemble businesses and their value relates to their ability to produce high test scores. Instead they suggest that schools should build emotional capital, the capacity to care for others which is as vital as other arrangements in tackling inequality. An education system that embodies affective norms represents a fundamental challenge to societal structures of (in)equality.

Rodotà (2014) reflects on the semantic shift that the term solidarity underwent during the Bush presidency in the United States (*Compassion* programme, 2001). At that time, solidarity came to be seen in terms of charity, or compassion, words that are semantically linked not to concepts of dignity and human rights, but to ideas about dependence on the generosity of others. This shift served to highlight the inadequacy of the person who is the object of solidarity. However, there remains an open debate about the word 'solidarity'. As Supiot suggests, solidarity has in fact '*une généralité et une neutralité qui ne possèdent ni la notion de charité, ni celle de fraternité*' (2013:44, cited in Rodotà, 2014). Indeed a society that does not recognise itself in terms of solidarity and affection and makes very few or no attempts to embrace these ideas in the policy-making process cannot claim to be resolute in the fight against inequality (Apple, 2013; Lynch et al., 2009). According to Apple (2013), an education system that fails to pay attention to these norms and rationalities is better thought of as a 'training' system rather than what we can properly call education.

This brief reflection provides context for the introduction of the Voucher Reform and the profound changes it brought about, not only to the administration and funding of schools, but also to ideas about the role of schools, assessment and quality. In all these areas, it would appear that the relational and affective dimensions of equality, which feature in initial curricula from the 1960s, are progressively lost. The next section of this chapter explores the place of equality in the current market-oriented education system in Sweden.

2.6.1 Equality and market-oriented education

How is equality defined and valued in the current scenario of market-oriented education? At the end of his account of the Swedish reform of 1950 and the decade in which the first reforms of the Swedish education system were implemented, Husén (1986) wonders whether the original concept of equality of education opportunity is still valid. He questions its continuing applicability in a society in which the primary task of education is now to equip students with the qualifications needed for professional and academic selection. Moreover, Husén ponders whether, at a time of economic crisis and limited resources, equality (in the distributional sense) might even be said to conflict with quality (the concept of quality itself was to undergo revision and re-construction, as will be shown in Chapter 8).

According to Rikowski (1999), as education policy is part of a wider social, political and economic context, it inevitably reflects key mechanisms in the society that shapes it. At present, Rikowski argues, the education process is subordinated to the principles of the capitalist market with education and training focused on the production or enhancement of labour power, and equality defined as the entitlement of each individual to receive an equal share of labour time and input from teachers, trainers and others involved in the process of labour production.

Dunkwu (2001) reflects on the relationship between equality, integration and respect for cultural diversity. He highlights the tension between educating for difference (by which he means educating in order to maintain the distinctiveness of various minorities), and educating for similarity (so that students from diverse backgrounds are not prevented from developing certain skills and competences which are indispensable in their social context).

Dunkwu (2001) identifies an implicit contradiction between striving for education equality, and the way schooling is currently oriented and structured (around competition, managerial models and results), and the curriculum is designed

(around certain subjects and ethnocentric perspectives). This reflection will be particularly helpful in analysing approaches to the curriculum in the case-study schools, in Chapter 5. The pressure on schools to achieve good results leads to central questions about the real meaning of freedom of choice and equality of opportunity, as certain students and families are not considered to be valuable 'clients' and are therefore excluded from some competing schools (Dahlstedt, 2008; Bunar, 2010). This finding challenges the idea that education is 'also about ensuring equity of access to different schools and social justice' (West, 2006:17).

McMurtry (1991:209), among others, observes that 'education as a social institution has been subordinated to international market goals including the language and self-conceptualisation of educators themselves'. Hatcher (2000 and 2001) also suggests that pressure groups from the business world have strong interests in ensuring that education shapes a future workforce that is efficient and obedient.

At an international level, education programmes and agendas are increasingly influenced by the work of organisations such as the OECD (Grek et al., 2009). Education becomes an international project that reflects dominant economic and political interests and is geared towards meeting the requirements of employers and the economy. International trends can, in fact, be seen to mirror the Swedish situation, not only in relation to the Voucher Reform *per se*, but also in relation to subsequent reforms implemented between 2010 and 2011 (these will be analysed in Chapter 4), such as the new curriculum for upper-secondary education, the teacher training reform, and the changes to the structure of academic and vocational pathways. There seems to be little room for relational and more complex constructions of equality in the current policy context, which emphasises a different vocabulary of efficiency and results.

These discussions provide important context for the analysis of policy documents in Chapter 4. The next section in this chapter provides more detail on international trends and the pressure they are exerting on national school systems.

2.7 Output culture and quality assurance in international trends in education

As will be explored further in Chapter 4, debates about decentralisation were central to education and wider social policy developments in the 1990s, both in Sweden and internationally. At this time, decentralisation came to be associated with what is

manageable, local and genuine, as opposed to what is large-scale, centralised and distant (Dahlstedt, 2009). However, decentralised models of governance were only thought to be feasible if citizens were also transformed and re-constructed as autonomous and self-regulating. From this perspective, 'every sign' of 'shouldering responsibility' was 'welcomed' (Ball, 2009a; Bell and Hindmoor, 2009; Dahlstedt, 2009). However, more critical commentators have identified that liberal democracies have developed a set of 'technologies of citizenship' that far from freeing people are designed to control them in new ways 'by strengthening their individual autonomy and active involvement in societal life' through new forms of monitoring and re-centralisation (Dahlstedt, 2009). Some specific examples concerning Sweden will be presented in the following section.

While decentralisation and re-centralisation have been important themes in contemporary governance, in an era of globalisation it is not simply the case that power has been straightforwardly devolved from larger to smaller units. For Brenner (2004, see Grek et al., 2009), a central political feature of contemporary processes of globalisation has been a rescaling and reconstituting of relations between the local, regional, international and global. This has strengthened the roles of international organisations such as the OECD and the World Bank. It has also reconstituted the nation state, which has been subjected to increasing pressures from within (Grek et al., 2009). For Grek et al. (2009), this rescaling has been associated with what Neave (1998) calls the 'evaluative state' and Clarke (2004) refers to as the 'performance-evaluation nexus'; in education this has comprised forms of assessment, monitoring and audit (Lindblad and Popkewitz, 1999, 2000, 2001a and b). The context described above has led to the implementation of different systems of performance management and evaluation aimed at informing educational practice and policy-making (Power, 1997; Castells, 2000; Desrosieres, 2002). Ozga and Jones (2006) identify a global trend in education policies spurred on by evidence about what works from monitoring and evaluation. They distinguish between 'embedded' and 'travelling policies'. National policy-makers in some countries attempt to mediate 'travelling policies', rearticulating them at local level (although in doing so they often implement them differently, as each nation has its own distinct context and circumstances). Embedded policies are also exported to other countries. By looking at the volume of policies received from or passed on to other nations it is possible to map international relations of power in the contemporary, globalised world (Grek et al., 2009).

In Europe, it was in Lisbon where the term 'education' was first replaced by the term 'learning' (Grek et al. et al., 2009). The race to make Europe into 'the most competitive knowledge economy in the world' (European Commission, 2001) was based on a new idea of 'learning' as key to national and international economic growth (Sedel, 2004; Gornitzka, 2006). The concept of education and its provision shifted from an institutionalised right provided by nations to an intra-national pathway to economic success (Grek et al. et al., 2009).

In research and policy, this new performance management and quality assurance regime came to be known as New Governance (Fend, 2012). New Governance is orientated towards the measurement of outputs; in the case of education of measurable student performance. A range of new standards and tests have been developed (Fend, 2012), with the intent of helping the education system become more efficient and competitive internationally. This change has been described as a shift from 'input steering' to 'output steering' in education policy (Tröhler, 2012). This emphasises the importance of results on (allegedly costly and ineffective) inputs (or investments), such as curriculum development, teacher education, and school buildings. Within this framework, central authorities (positioned as experts) are assigned the task of defining minimum achievement standards. Schools are granted partial autonomy in the way they achieve these standards and are rewarded according to their results. The practices of achieving schools, identified as 'best practices', can be replicated in less successful schools (Lindgren, 2015).

The focus on improving education through the use of empirical data has also led to a vast field of research on 'the effective teacher' (Popkewitz, 2012). This body of research aims to empirically specify the attributes, capabilities, and qualities of a teacher that can achieve positive outcomes for all children. The New Governance regime suggests that, once these attributes are identified, they can be used to design classrooms, teachers and children through a discourse of 'effective teaching'. As various authors have argued, the cultural thesis of effectiveness makes use of the econometric language of 'value-added modelling' (Dillon, 2010; Day, Sammons and Gu, 2008).

Through the OECD, or more precisely the initiative 'Education at a Glance', this particular steering model was implemented in countries with very different cultural and political conditions. Indeed 'Education at a Glance', and the performance indicators used to support this programme, seems to be culturally indifferent. Comparative research within this programme was not used to explore the different

cultural and historical contexts for the implementation of school systems. Quite on the contrary, it was reduced to measuring outcomes against a generalised model of governance (Grek et al., 2009).

In order to obtain more comparable data about education systems, curricular contents have to be standardised, and monitoring systems have to be established to regulate schools. In Sweden University-based studies of education, curriculum theory, or history and philosophy of education, were considerably reduced in teacher training programmes (Beach and Dovemark, 2011). Subject specialists were co-opted to formulate standards and cognitive psychologists to collect data (Beach, 2010; Tröhler, 2012).

The OECD's Programme for International Student Assessment (PISA) represents the ultimate expression of this new model, as it not only disregards cultural factors but the actual curriculum too (Grek, 2009). PISA emphasises the idea of competencies to be used in later life, rather than knowledge to be learned at school (OECD, 2001:14). It focuses on 'young people's ability to use their knowledge and skills in order to meet real-life challenges', shifting attention away from the content of and methods associated with local curricula. From the perspective of the OECD (2001:27, cited in Grek, 2009)

assessments that test only mastery of school curriculum can only measure the internal efficiency of school systems. They do not reveal how effectively schools prepare students for life after they have completed their formal education.

For the OECD (ibid.) 'life' appears to be constructed as culturally non-specific or universal:

PISA offers a new approach to considering school outcomes, using as its evidence base the experiences of students across the world rather than in the specific cultural context of a single country.

This way of thinking helps explain the focus in many countries on international education and international curricula, as the case study schools in this project illustrate (Chapters 5 and 6). As highlighted in Chapter 1, the number of international schools has been growing consistently in Sweden over the past few years (*Skolverket*, 2014), as have opportunities to study for the International Baccalaureate, as a route to securing higher education places or jobs overseas. The impact of internationalism and of the discourse of global competitiveness on the Swedish curriculum is discussed in detail in Chapter 5.

This approach to education as quantifiable learning outcomes is at the heart of the empirical case study research carried out for this project and will be explored in more detail in subsequent chapters. The last section of this chapter focuses on ideas of responsabilisation and self-regulation (Dahlstedt, 2009), which are central to New Governance (Fend, 2012) and underpin a number of education policy changes, including those related to the role of teachers and school managers (discussed in Chapters 6 to 9).

2.8 Responsibilisation and self-regulating citizenship

The policy changes taking place over the past 20 years can be framed in the context of an international movement towards the creation of a 'Knowledge Economy'.

This is a policy trajectory that is preoccupied with the construction of a 'knowledge economy' and 'learning society'. Within this trajectory schooling/education/training systems are acknowledged to be significant instruments of economic and social change. [...]. Enterprising selves are promoted (in all senses of the word) in schooling and work (Ozga and Jones, 2006:2)

In this context, there is a new government emphasis on policies concerning 'work experience', 'education for work', and 'the flexible worker', as well as on developing an 'enterprise culture' through education (Peters, 2003).

Bourdieu emphasised that neo-liberal policies, such as those in education designed to create enterprising selves, have contributed to the dissolution of the public sphere. Shifting from the domain of what is national and tangible to what is global and abstract, politics has become demeaned (Bourdieu, 2003). Castell's (2000) comments on the same phenomenon, of power becoming increasingly fluid and hard to locate: 'The dominant tendency is toward a horizon of networked, ahistorical space of flows, aiming at imposing its logic over scattered, segmented places' (2000:495). This has been evident in the implementation of PISA, which takes no account of the specific contexts and cultures of the countries it assesses. It is also evident in a number of national policies recently implemented in Sweden, which are all based on ideas of governance, flexibility, self-regulation and individual responsibility (Dahlstedt, 2009; Thörn, 2012). This study will explore how these key terms are employed in different policy areas, and how schools and staff are affected by them.

As highlighted above, key to these policy changes was the idea that citizens, conceptualised as consumers, are self-regulating subjects and bear full

responsibility for their choices and consequent outcomes. In constructing citizens in this way, the central state relieved itself from some of its responsibilities for citizens' opportunities and well-being.

As outlined in Chapter 1, these changes were implemented from the 1990s when the Swedish welfare system was severely affected by the biggest crisis to hit the national economy since the immediate post-war period. In the face of this economic crisis, the Social Democratic government elected in 1994 opted to continue with the 'Only Way' policies put forward by their Conservative predecessors. The 1995 entry into the European Union confirmed trends of internationalisation of the Swedish State (Jacobsson, 1997), through policies that replaced commitments to full-employment and redistribution with commitments to balanced budgets, inflation control, cuts to benefits, deficit reduction and deregulation, as also outlined in Chapter 1.

In several different public policy areas the traditional public sector was gradually replaced by a complex range of public-private hybrids. In the case of education, for example, private enterprises were granted public funding to run schools, with an associated focus on decentralisation and individual responsibility and self-regulation (Dahlstedt, 2009; Thörn, 2012). Examples of such changes can also be found in relation to the labour market, Swedish language provision for immigrants, social housing and healthcare.

In relation to the labour market, the term 'employability' began to appear in policy documents from the 1990s (Jacobsson, 2004). Employability described the main characteristic a job seeker should have, and the use of the term served to shift responsibility for the lack of a job from the system to the individual. Another key term that began to be used recurrently in labour policy documents from the early 1990s was 'responsibilisation' (Budget Bills 1992 to 2011; Bengtsson and Berglund, 2012). Unemployed people were increasingly positioned as individually responsible for staying employable. It is worthwhile noting here the link with the curriculum for upper-secondary education implemented in 1994, which will be analysed in Chapter 4, which included for the first time entrepreneurship among the core skills the education system must foster in preparation for professional life. The use of the term 'responsibilisation' served to reinforce yet again the idea of individual responsibility and agency in developing and maintaining a professional life, and to underplay the state's responsibility for unemployment.

A language of individualisation, competition and choice shaped the construction of political legitimacy in this area. For example, through a modern matching service, the unemployed were 'given increased opportunities to compete', and employment offices would be better able 'to respond to the job applicants' needs through more 'individual services' (Budget Bill, 2007). As in the case of education policy (Chapters 3 and 4), an analysis of the language employed in these documents shows a problem-solution pattern (Hoey, 2001; see Chapter 3 for further discussion), in which there appears to be only one way to solve particular social problems. Such patterns were indicative of attempts to discipline the unemployed and maintain their motivation for job-searching, as part of a strategy of responsibilisation in line with 'advanced liberalism' (Miller and Rose, 2008). The focus on skill-enhancement, training and human capital accumulation, which were central to employment policies up to the mid-1980s, no longer appeared to be priorities for the reformed Swedish labour market.

The binary construction of individuals as either 'employable' or 'unemployable' can also be seen in curricula for Swedish as a second language (*Sfi* – Swedish for immigrants), which were implemented in the same period, from the mid-1980s to 2006. An overarching discourse of individualisation, personal choice and responsibilisation, as well as accountability and a focus on results (e.g. employability), is also common to these documents (Rosén and Bagga-Gupta, 2013). These themes are mirrored in housing policy too. In the 1990s, homeless people were constructed as personally responsible for ensuring they were eligible for housing benefits. Eligibility depended on having references from previous landlords and a record of employability or active job searching (Lind and Lundström, 2007; Löfstrand, 2012). In housing, as in other policy areas, marketisation and a focus on individual responsibilities were central elements in a new discourse of governance.

A final example can be taken from the healthcare system, where patients gradually came to be constructed as responsible for their own health and treatments, supported by the introduction of telemedicine in some of the less populated areas of the country. Drawing on management models from industry (Vinnova, 2004) and the service sector, such attempts to 'virtualise' healthcare relied for their legitimacy on the idea that this would allow for more timely care delivered closer to patients in need (Petersson, 2012). However, while it could be argued that the use of ICT (information and communication technologies) allowed more effective

communication among healthcare staff, thus freeing up time to spend on patients, it could equally be argued that it was designed to make better use of patients' own labour to free up resources for healthcare staff and organisations (Petersson, *ibid.*). Understood in this latter way, these changes herald a fundamental shift in agency, from the medical professions to patients, who are made increasingly responsible for monitoring bodily signs (often by interacting with machines, e.g. those that measure blood sugar levels for diabetics), and acting on them if necessary.

Having outlined the governance and de-regulating trends of the 1990s, this section has used some examples from areas outside of school education to illustrate the influence of powerful international discourses and key terms on social policies in Sweden. Alongside analyses of the shift from equality to equivalence, this exploration of key themes and policy trends will provide valuable context for the data analysis sections of this study in the chapters that follow.

2.9 Conclusions

The concepts of equality and equality of opportunity in education need to be defined in relation to their social and historical context. The idea of equality as equal distribution of inputs, which underpinned the Swedish education reform of 1950, has been challenged by subsequent conceptualisations. Over time, this notion of equality has evolved into a more complex idea, which takes into account the diversity of individuals in terms of their social, cultural and ethnic background, as well as their gender and (dis)ability. However, traditional ideas about equality in education have also been increasingly challenged in the context of a managerial approach to education involving school competition and a focus on results. This is the case in Sweden and internationally as well.

Many common trends can be identified in Swedish and international policy, with respect to education and the other policy areas mentioned above. In all these areas, traditional, planned welfare models have collided with New Public Management (Lane, 2000; Jarl et al., 2012) dictums and practices. Across a range of social policy areas, citizens have been repositioned as clients, and freedom of choice, decentralisation and quasi-markets have become the focus of attention. The work of Bourdieu is especially helpful in analysing these important changes. In his later work Bourdieu (Bourdieu and Wacquant, 2001 and Bourdieu, 2003) focused on the impact of globalisation and consequent policies from the 1980s and 1990s that were

inspired by neo-liberal international ideas. According to Bourdieu (2003:35) a neo-liberalist agenda seeks to dismantle 'the social state', which 'safeguards the interests of the dominated, the culturally and economically dispossessed, women, stigmatised ethnic groups, etc.'

Looking across the different policy areas discussed above, it is clear that common to all of them is the construction of citizens not only as consumers, but as active agents responsible for their own choices, successes and failures. Some commentators (Thörn, 2012; Larsson et al., 2012) have described this as a shift towards a form of advanced liberalism in which central state regulation has been replaced by mechanisms of self-regulation and self-control (Dahlstedt, 2009). This change has important consequences for notions of professional expertise in education and in other areas such as healthcare, as was suggested in this chapter.

While professional expertise has traditionally been constructed as an important way of regulating social life, expertise itself has now become the object of regulation. The expertise of doctors, teachers, and social workers has been re-imagined through the lens of freedom of choice, flexibility and personalisation of services, and through decontextualised forms of assessment. The use of telemedicine to screen and select patients in need of medical attention, or the role of employment agencies focused on job searching rather than training are two manifestations of such a change. The new professionalism of teachers (discussed in relation to the reform of teacher training in Chapter 4) needs to be understood in this broader context (see Chapter 9).

Stoker (2004:166) refers to this as 'self regulation' and 'constrained discretion', while Ball writes about de-concentration rather than devolution (Ball, 2009a). Measurement, comparison, goal-setting and monitoring replace direction and professional expertise (see the 1994 and 2011 Swedish curricula and the focus on assessment analysed in Chapters 7 and 8). These mechanisms construct new types of active subjects: the 'responsible job-seeker'; the 'informed patient', or the 'reflexive teacher' (Thörn and Larsson, 2012).

Deleuze (1995) reminds us of the importance of recognising that one is at the beginning of a new era. In different institutional settings, such as schools, hospitals and even prisons, attempts are made to enhance monitoring and control through a new type of continuous evaluation including self-assessment, drug treatment and electronic tagging in the three cases in point. One final observation that needs to be

made in this chapter is that institutional changes and regulations must be scrutinised in practice and in context to see how policy reforms are enacted in reality. Policies need to be contextualised; exploration of specific contexts can shed light on the consequences, often unexpected, of policy change. Writing in relation to education, this process is what is involved in undertaking what Ball (2003) amongst others has referred to as 'policy trajectory' studies. It is this process that will be analysed in relation to the Stockholm school market, in the following chapters. Educators in Sweden and internationally have been grappling with the changes in policy, processes and ideology outlined in this chapter. It is vital that they continue to investigate and develop a sound understanding of the impact on education of these changes inspired by neo-liberal ideology. Paraphrasing Rodotà (2014), a central question to be asked is whether even discussing issues of equality and solidarity is anachronistic in a post-modern and 'liquid' society, which is increasingly globalised, mutable, and therefore impossible to frame according to universal principles. Is it still feasible to reach for equality and solidarity, or does harsh reality suggest that economic sustainability is the only reasonable guiding principle for education? Rather than providing abstract answers, this thesis aims to explore what is happening and what is possible in some different and specific contexts. While it is crucial to recognise the power and effects of neoconservative and neoliberal policies (Apple, 1996 and 2006; Gandin, 2002), it is also essential to understand how these are subject to processes of negotiation and change at national and local levels. Ball (1994) emphasises that policies are an ensemble of practices and technologies that are negotiated, resisted and worked over in specific local contexts. The case studies of Swedish schools presented in this research exemplify this negotiation in practice. They shed light on what happens when traditional, national values and global trends meet and are interpreted and acted upon by different actors.

Chapter 3

Theoretical and methodological considerations

3.1 Introduction

The main method of inquiry for this study is qualitative research, and more specifically, qualitative case studies of two schools involving semi-structured interviews and school observations. A qualitative research method was chosen because a basic aim of the study is to 'acquire insight and develop understanding' by getting as close to the data as possible, rather than remaining more detached by using quantitative methods such as surveys (Clarke, 1999:39). An analysis of education policy documents and literature, relating to both the Swedish and international contexts, was undertaken to supplement empirical investigations. National policy documents from the 1960s onwards proved to be a particularly invaluable source of data. The analysis of secondary sources formed the backdrop against which findings from the empirical work were interpreted and conclusions drawn.

This chapter begins with a description of and rationale for the theoretical approaches underpinning this research, namely social constructionism and policy sociology. The chapter then outlines the different phases of the study and the rationale for the sampling of case study schools and informants. Then, the chapter offers an overview of the different stages and methods of data analysis. Finally, it considers the main ethical concerns that emerged throughout the different phases of the research and how they were resolved.

3.1.1 Theoretical approaches

In order to analyse the ways in which education practices are constructed by Swedish education policy texts, my study draws on a social constructionist framework, informed by policy sociology. Reflecting the social constructionist focus on the relationship between power and knowledge, and more specifically using some of the tools and concepts drawn from critical discourse analysis (CDA), this work seeks to show how national and local (school) policy texts construct and 'allocate' values (Taylor et al., 1997:29).

3.1.1.1 Social Constructionism

Social constructionism encourages consideration of how material and discursive practices are created by people, in interaction with others, within specific social and cultural contexts. A focus on language is a keystone of social constructionism. Language enables us to construct our experience of the world and ourselves by providing a structure to express and share this. According to social constructionism, language is a pre-condition of thought (Burr, 2003). So rather than being a code indicating a set of clear meanings describing reality, language is understood by social constructionists as essentially performative. It is a historically generated, collective tool through which we mediate, make meaning and construct the world (Linell, 1998; Säljö, 2000; Wertsch, 1998). As such, it is a site of variability, disagreement, power-play and potential conflict, where meanings and practices are constructed, negotiated and renegotiated over time.

More precisely, this study is located within a macro constructionist approach. Following Vivien Burr, I have used the terms 'micro' and 'macro' social constructionism to refer to its two main expressions. Micro social constructionism suggests that the discourses arising from daily, ordinary interactions construct the only form of reality people can interpret; no other forms of reality exist beyond our linguistic articulation of it. Macro social constructionism identifies that language has a powerful performative character, however it suggests this results from social structures, practices and relations that exist beyond language itself. Power is a core idea in macro social constructionism. This form of constructionism is strongly focused on the analysis of different forms of inequality (social, economic or, for example, related to health, disability, or ethnicity) and aims to challenge such inequalities (Hollway, 1981; Kitzinger, 1989; Burman, 1990; Ussher, 2000).

The implications of taking a macro social constructionist perspective to this study are that education practices need to be understood in relation to the discursive and social practices in which they are embedded and through which they are produced. This requires sensitivity to the inherently political nature and the potentially powerful performative effects of the shift from the language of 'equality' to the language of 'equivalence' in Swedish education policy.

In addition to 'equivalence' constructions of 'internationalisation' and 'quality' are also interrogated and problematised in this research.

3.1.1.2 Critical Discourse Analysis

The critical analysis of language and discourse within organisations, in this case, schools, as expressed in 'texts' and in 'discourse practices', e.g. in the organisation of work, construction of professional roles etc., can illuminate important shifts in authority-relations and teachers' self-identity. As Fairclough (2010:31) puts it:

The critical approach has its theoretical underpinnings in views of the relationship between 'micro' events (including verbal events) and 'macro' structures which see the latter as both the conditions for and the products of the former, and which therefore reject rigid barriers between the study of the 'micro' (of which the study of discourse is a part) and the study of the 'macro'.

Working with critical goals implies analysing linguistic interactions by paying attention to the way they are conditioned by and in turn shape social structures. CDA has in recent years illuminated, in particular, the restructuring of the discourse of public institutions along market lines (Fairclough, 2010). This work has revealed an extensive restructuring of boundaries between discursive practices. For instance, 'advertising' as a discursive genre has influenced and gradually taken over discourses of public service and professionalism to a large extent, in doing so creating new, hybrid genres. In relation to education, for instance, this has resulted in the creation of school steering documents that are part policy documents, part marketing materials. Critical approaches have also identified a process of gradual instrumentalisation in discursive practices. Within the field of education, crucially, this has involved the positioning of education as a means of personal investment rather than as a transformative process of intrinsic value (Rikowski, 1996; Winch, 1996; Tooley, 1998; Apple, 2000 and 2006; Fairclough, 2010).

In subsequent sections of this chapter I will return to my use of elements of CDA as analytical tools in this research. I will also describe its application in relation to the analysis of data in this research.

3.1.1.3 Policy sociology

As a qualitative study of the effects of 'equivalent education' on school organisation, staff identity and pedagogy, this research fits within the policy sociology research tradition (Ozga, 2000), as already introduced in Chapter 1. It would most likely be defined by Maguire and Ball as an enactment study, focusing on the 'interpretation

of and engagement with policy texts and the translation of these texts into practice' (1994:279). By simultaneously incorporating an historical perspective, exploring decentralising and de-regulative/re-regulative policies in education, as well as the examples of housing and the labour market presented in Chapter 2, the study demonstrates how the legacy of past economic, social and political contexts continues to shape the contemporary content and language of education policy documents.

Research tells us that seemingly simple policy concepts are open to multiple interpretations and therefore a range of possible approaches to implementation (Lamb et al., 2004). If, as Bowe, Ball and Gold (1992) argue, policy processes are subject to the 'messy realities' of negotiation and resistance, it is necessary to explore policy outcomes *and* the way these are shaped by earlier policies, circumstances, and the initiative of individuals and communities involved in and impacted by the process. The research on choice in education, intrinsically related to contemporary notions of equivalence, is complex and far from conclusive for just this reason. While choice advocates focus on and support the equal, individual right to 'freely choose' a school (Chubb and Moe, 1990; Hoxby, 2001; Walford, 2003; Betts and Loveless, 2005) others focus on how choice is exercised unevenly across social groups because of pre-existing structural inequalities (in income, information and geography) that shape the context in which such choices are made (Apple, 1996, 2003 and 2006; Fiske and Ladd; Bunar and Kallstenius, 2007; Beach and Dovemark, 2009; Beach, 2010; Bunar, 2010).

A recognition of the importance of context in policy analysis, acknowledged in the concept of the policy cycle developed by Bowe et al. (1992), leads one to consider not just the time and site of production of policy texts but also their 'intertextuality' (1992:21). Bowe et al. (1992) argued that policies are shaped and contested in three main contexts: influence, text production and practice. Two additional contexts were then added by Ball (1994): the impact of policies on equality and individual freedom, or the context of outcomes; and the identification of social and political activities, or the context of political strategy, 'which might more effectively tackle inequalities' (Troyna, 1993:2).

By considering all five contexts, this study will analyse the intentions behind state policy (e.g. equivalence as the achievement of standardised goals), the room for ambiguity within policy texts, and the contradictory ways in which equivalence has

been enacted by school managers and teachers operating in an autonomous, differentiated way within the context of practice. This approach also enables exploration of the ways in which 'equivalence' travels across policy contexts to create unexpected consequences as new contingencies arise. This will be shown, for example in Chapters 7 and 9, which consider how the flexible equivalence framework allows new regulations on staff employment, and how schools react to the new school inspection process.

My research questions demand an investigation of the 'big picture' – the historical evolution of the discourse of equivalence from the late 1970s/early 1980s onwards, as well as different facets of the contemporary policy context of practice (Ozga, 2000; Ball, 2003). They also demand an investigation of the relationships that are forged in each specific social setting and the way in which these relationships serve to shape staff identity in individual schools. The study of individuals acting within complex, real-world social and cultural circumstances, suggests a qualitative research strategy.

3.1.2 A qualitative approach

Attempting to characterise and then bridge the detail and the big picture as a means of illuminating the trajectories and effects of education reform presents some particular challenges. Claims related to the transformative impact of policies that devolve responsibility and introduce increased scope for choice are not easily evaluated without examining the ways in which people respond to them at a local level. One approach would be to investigate particular policies in relative isolation from one another (e.g. the 2011 Curriculum for upper-secondary education). However, Grace (1991) cautions against the potentially damaging impact of abstracting detail from its wider structural, political and historical context, drawing a useful distinction between 'policy science' and 'policy scholarship'. Arguing in favour of the latter approach, Grace claims this allows for 'an examination of the politics, ideologies and interest groups of the policy making process, the making visible of internal contradictions within policy formulations, and the wider structuring and constraining effects of the social and economic relations within which policy making is taking place' (1991:42).

Ball (1990), Gewirtz et al. (1995), Ozga (2000) and Whitty (1997) support the use of qualitative approaches when striving to understand the 'struggle and strategy' (Ball,

1990:15) that characterise education reform. These commentators argue that qualitative studies offer the opportunity for a much-needed corrective to the seductive 'value-free', 'objective', concreteness of the policy discourses currently dominating education (see section 3.2 for further discussion). Following in the tradition of these scholars, my investigations have sought to examine wider contextual factors alongside the richness of specific local contexts, an approach for which qualitative research is perfectly suited.

Qualitative inquiry presents opportunities to examine what happens when governments attempt to put political and economic theories into practice. Public sector policies over the past two decades have been powerfully influenced by market theories. However, the market cannot be considered the only factor influencing the choices of families and practices of educational institutions. As Bagley et al. put it, 'This is because these incentives can only come to have an effect through their incorporation in people's meaning and understanding of the world and in their day-to-day lives' (Bagley, Woods and Woods, 1996:41). Gewirtz et al. (1995:5) similarly recognise potential disparities in the way markets operate at local, national and international level, which reflect difficult processes of negotiation and resistance that occur as people come into contact with and react to 'lived markets'. Qualitative inquiries best illuminate these real-life circumstances, and the negotiations and struggles that shape and result from them. They offer the possibility of developing a deeper understanding of context, interdependencies, and personal experiences, and support the generation of detailed descriptions of the phenomena under scrutiny.

Ozga alerts us to the central role of value positions in the development and selection of theoretical positions (see Ozga, 2000:90 for a discussion of the role of values in methodological controversies, and Gorard, Taylor and Fitz, 2003:198). Value positions impact on all aspects of research design, including selection and interpretation of evidence (Stanley and Wise, 1993). Acknowledging engaged subjectivity, it is clear that I have been influenced in my theoretical choices by my ideas about how things ought to be, and this has shaped my choice of research topic, research design and research implementation. Recognising the ideologically-driven nature of research, a qualitative approach has provided space within which I have been able to locate myself by identifying and reflecting on my role, biases and ideological preferences (Janesick, 1994:212).

Education research often derives from the researcher's own knowledge and experience, from both a professional and personal perspective, of the implementation of policy. I lived in Sweden and worked in an upper-secondary school in Stockholm for five years. When the school I worked for was taken over by one of the main independent school providers in the country, I experienced first-hand the impact of this transition. It heralded a complete change in school ethos, organisation, and staff identity. This shift led me to question how it could be possible that such opposing models of education could co-exist under the umbrella of an 'equivalent' curriculum. My explorations of the situation in other local schools confirmed the huge variation that equivalence allowed.

It was this 'lived experience' (Gewirtz et al., 1995) of market-oriented education reforms that powerfully shaped my understanding as a teacher in Sweden and in the UK and, later, as a researcher. My experience in the Swedish and other education systems has allowed me to explore my research questions not only from the position of an 'insider', but also from that of an 'outsider'. A qualitative study has been ideally suited to reflecting on these issues and the many complexities they entail.

3.1.3 Case study research

This research aims to provide rich and detailed description and analysis of the way in which equivalence is constructed and enacted at local level in two upper-secondary schools in the Stockholm municipality of Sweden. A case study design was ideally suited to this task.

Yin (1994: xi) has characterised a case study as an experimental examination that 'investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident'. This characterisation provides an important basis for my choice of a case study methodology. The complex interactions between national and local policies, and between local policies, actors and contexts are fertile terrain for a case study approach. 'Case studies help provide insight into meanings people give to the reality around them' (McTavish and Loether, 2002:182), a central concern of this research.

Using the classification by Merriam (1988), this research can be defined as an interpretative case study. Interpretative studies are rich in detail and used to

develop conceptual categories that illustrate, support or challenge existing assumptions. One of the key assumptions under scrutiny in this study, held by people across the political spectrum and by much of the Swedish media since the 1990s, is that the shift from an equal to an equivalent education has left the founding values of Swedish education intact, whilst at the same time improving its quality.

The main aim of this research is to study and analyse the impact of different constructions of equivalence at school level. While the study is framed by an understanding of the broader policy background, it explores equivalence through a close examination of the social relationships within the marketised context of two particular schools. The study design relies on a range of strategies of data collection, including observations, analysis of supplementary data and documents (ranging from national and local policy documents, to newspaper articles, and school marketing materials) and interviews. These strategies are discussed in more detail below (see section 3.3).

3.2 Research validity and generalisation

In the school choice debate, Gorard et al. (2003) defend the use of quantitative methodologies involving large samples and statistical modelling as they supposedly produce 'objective data' that are more 'reliable' and 'valid', and reject qualitative studies because they are small scale and use 'questionable methods of analysis' (Gorard et al., 2003:2). Godard's support for statistical methods to explore school effectiveness (Gorard and Fitz, 2006:812), which has its origin in positivistic research traditions, points to considerable divergence between researchers as to what constitutes valid research. However, there are inherent flaws in the arguments of researchers such as Godard who find 'fault with [qualitative] work that is quite explicitly not in that [quantitative] tradition' (Ozga, 2000:91).

Ozga's discussion of the Tooley/Gewirtz dispute over whether the qualitative method can support generalisations about the relationship between social class and school choice (2000:91) is helpful here. It serves as a good illustration of two essentially different world-views and how they can influence the conceptualisation of policy problems, decisions about research methodologies and ultimately, research findings. Ozga's subsequent suggestion, that the choice is less about quantitative versus qualitative than 'the kind of data that are sought' (Ozga, 2000:92) is pertinent

to this research project which seeks a deeper understanding of the responses to policies of 'equivalence' in one specific Swedish context. As Donmoyer puts it:

The classic hypothesis/generation/verification distinction ignores the fact that in fields such as education, social work and counselling – fields in which there is a concern with individuals, not just aggregates – all research findings are tentative.

(Donmoyer, 1990:183)

Underlying qualitative data collection is the idea that the object of research is 'holistic, multi-dimensional and ever-changing; it is not a single, fixed, objective phenomenon waiting to be discovered, observed and measured' (Merriam, 1988:167). However, this leads to concerns about the general validity of the findings of qualitative research. The difficulties associated with drawing generalisations from qualitative research (external validity), including qualitative case studies, have been the subject of much debate in the literature (Clarke, 1999); one leading example of such debates has been provided at the beginning of this section (Ozga, 2000).

Following Schofield (1990), a helpful way to conceptualise generalisation in qualitative case study research centres on the 'matter of the 'fit' between the situation studied and others to which one might be interested in applying the concepts and conclusions of those studies' (Schofield, 1990:226). In this case these 'other situations' would, in the first instance, be other independent upper-secondary schools with a focus on international education in highly populated city districts in Sweden. However, mechanisms of staff identity construction and pedagogical choice could be of wider relevance to other education institutions in the country. Turning to the question of internal validity (or the extent to which conclusions about each of the sample schools can be considered defensible), I took several steps to try to ensure my findings were robust. I interviewed multiple people in each site to get a range of perspectives, and analysed a large number of different local documents to get a strong sense of local ethos, values and contextual practices. Denzin (1970) has identified the different types of triangulation that can be used in research, among them 'data triangulation', by that meaning data collection that is spread over time and involves more than one location and person. These approaches to triangulation were firmly embedded in this research. Data was collected over a period of three years and compared and contrasted in terms of language and content. Data from interviews and observations was also analysed against findings from the review of national and local policy documents.

3.3 Study design and implementation

This section describes the stages in which the study was planned and then carried out. It discusses the selection of sources (primary and secondary) and analyses how the case study schools and informants were chosen. Finally, the section outlines the different phases of data collection through school visits and interviews, and analysis of school local documentation.

3.3.1 Secondary sources

The analysis of documentary sources was a key part of this project. Various policy documents were particularly relevant to the study, including those published by the National Agency of Education (*Skolverket*), the School Inspectorate (*Skolinspektionen*), National Department of Education, Ministry of the Interior, Council of State, and by individual schools. Documents relating to the development of trends in national education policy from the early 1980s were particularly important, as were those outlining evolving constructions of the term equivalence. In addition, policy-relevant data published by Swedish and international research centres and other official bodies (including the OECD, Government Institute for Economic Research, and National Agency of Statistics) provided valuable context on a range of topics including economics, finance and demography.

Secondary data sources were also used to provide socio-economic context for the case study municipality. Most of the documents analysed for this purpose were available on-line; some older policy documents (published prior to 1989) were available at the Government Central Archive in Stockholm. I visited the archive on a number of occasions during the preliminary stages of the research (in 2012). In order to maintain confidentiality and anonymity of the case study schools, sources relevant to specific schools are not listed in the bibliography.

Throughout the research process I followed Swedish national newspapers for articles and opinion about developments in education policy. This activity was designed to keep me up to date with current issues rather than constituting a distinct part of the research. It was particularly crucial for keeping abreast of the outcome of local elections and important policy developments.

The majority of documents analysed for this research were scrutinised in their English version, available from the *Skolverket* or National Department of Education websites. Some policy documents from the 1960s and early 1980s (such as early curricula and government bills) were not available in English. In these cases, I analysed the Swedish version and translated those sections I quoted into English myself. Translations were then proof-read and edited by a professional Swedish translator.

The first stage of my research involved an analysis of policy texts reconstructing the meaning of equivalence in education policy over the past 30 years. Following Englund's approach to policy analysis (1999a, 2005), the documents were examined individually and then grouped by category: curricula; government bills; and reports. Curricula were compared in terms of structure and organisation of the documents, as well as content. The use of the key-terms 'equality' and 'equivalence' was followed through all documents. The different contexts in which these terms appear were analysed with a case-by-case approach and then in comparison with one another. I also carried out a precise computation of the number of times key terms used in particular documents. In the case of documents written both in Swedish and English, the computation was based on the Swedish version.

In analysing documents, I tried first to identify the main concepts framing education policy and how these were embedded in key-terms. I tried then to identify the emerging circumstances in which these terms came to embrace new meanings and challenge the original contexts in which they emerged. For example, the term equivalence was at first only employed in pedagogical contexts but, over time, came to refer to school management, organisation, and quality assurance.

Following the document analysis, I selected a school sample that would allow me to analyse how equivalence was interpreted and enacted at local level. The criteria I used to select the schools are described below.

3.3.2 Case study municipality and schools

I chose Stockholm as the context for this study as, being the municipality with the highest concentration of upper-secondary schools, it offered a broad spectrum of schools from which to pick my case study institutions.

The selection of case study schools focused on upper-secondary (rather than primary) schools for an important reason. I wanted to concentrate on independent schools because these were the first to be given more flexibility in terms of provision and pedagogical approaches. The first independent schools in the 1990s were mostly centred on specific pedagogical models (*Skolverket*, 2003), and I wanted to observe how this variety was constructed and maintained in relation to equivalence and explore the impact of private companies in education. As the majority of independent schools are secondary schools, and the upper-secondary school sector underwent a major reform in 2011 expanding the number of national programmes schools are allowed to offer and changing the grading system (see Chapter 4 for more details), this focus on secondary schools made sense.

The choice of international schools offered me the opportunity to investigate how 'international' education is constructed and enacted by different education providers (see the following section and Chapter 5 for further discussion). 'Internationalisation' appears as a key term in the 1994 and 2011 curricula, but how internationalisation is constructed and enacted by Swedish schools has not yet been studied.

I considered all these factors relevant and important to include in my analysis of how schools construct and relate to the concept of equivalent education. I wanted to analyse how schools and staff were relating to the full set of policies resulting from the Voucher Reform, choice and equivalent education, and the 2011 reform was a direct consequence of all these changes.

In this research independent schools will be referred to either as independent or free schools, from the literal translation of the Swedish term *friskolor*.

3.3.3 Sampling

From the start it was clear that any form of random sampling would not be a suitable method for selecting the schools for this study. This was first because of the large number of schools in the municipality offering very different programmes, and second because of the nature of the research which required a small sample to gain a meaningful, deep insight into school culture, ethos and development priorities. As de Vaus (2001:241) has pointed out, with this type of research 'the critical thing is to select the most strategic cases to test our propositions'.

The 1994 and the 2011 curricula for upper-secondary education highlight internationalisation as one of the constitutive features of Swedish education (I provide an analysis and problematisation of the concept of internationalisation in Chapter 5, which also introduces the sample schools). For this reason, I sought to select schools that professed to be international, as evidenced in their marketing materials and annual reports. On this basis, six international schools were identified, one municipal and five independent.

Marketing materials, yearly reports and statistical information on the six long-listed schools were analysed and compared, identifying common themes and goals in terms of school vision, ethos, results and provision. The information analysed was accessible via the schools' websites, SIRIS database (database containing information on schools, education and childcare), or from the *Skolverket* website. As highlighted above, local school documents were analysed using tools drawn from critical discourse analysis. Key words and different constructions of the same central concepts (e.g. student participation and behaviour, results, pedagogy etc.) were identified and analysed across school documents. The significant degree of naturalisation of themes such as 'results' in marketing materials, in sharp contrast with the pre-1994 curriculum, made it challenging to recognise them as promoting a specific position instead of being simply 'common sense'. Indeed the focus on results, rather than on student development, became naturalised to the extent that its discourse formation achieved complete dominance. Over time, it came to be presented as 'the lexicon', or the natural code.

The six long-listed schools were placed on a *continuum* based on different constructions and naturalisations of the study's key terms and themes. Whilst some schools exhibited a higher degree of naturalisation of contemporary conceptualisations of equivalence (including management by objectives and a focus on results), others exhibited a more critical approach and a construction of the term that was closer to its early 1980s conceptualisation (as a focus on student individuality). The schools positioned at the two, far ends of the spectrum (Parkview and Stoneville) were then selected as case studies. These schools seemed to embody and enact the equivalent policy in two distinct and even opposing ways, and by doing so confirm the flexible nature of the concept.

3.3.4 School visits

Between August 2012 and September 2014, I undertook 15 school visits (eight to Stoneville and seven to Parkview). The shortest visits lasted just one day and the longest three days. During each visit I was granted extensive access to the school environment and use of school facilities, including staff rooms and study areas. At both schools, I observed staff meetings, student-staff academic and pastoral meetings (mentor time), classes, student-led projects, informal gatherings of students and staff, extracurricular activities (performances and sports competitions), meals, and breaks between classes. For most of my visits I had a number of interviews already scheduled in advance; however, on a few occasions I arranged interviews with staff on the day of my arrival. On two occasions (one at each school), I visited the schools without carrying out any formal interviews, but instead engaged informally with students and staff.

3.3.5 Field notes

During my visits I took notes in a note-book and pictures of premises using my mobile phone. Notes were transcribed after each visit and divided into different categories (classes, meetings, etc.) in order to allow comparisons across the two case study schools. Notes and photos were saved on a computer and password protected.

Following Hitchcock and Hughes (1995), the process of recording field notes had several stages. First, at a suitable time and place I took shorthand, quickly written, temporary notes about all the events and activities observed during my visits. Abbreviations and personalised systems of referring to individual staff, students, locations or activities were generated. Key words and phrases were frequently noted down. Short quotes were also remembered and noted as accurately as possible. The second stage was to translate these initial notes into something more systematic and permanent. Notes were typed up on A4 paper, with a new page for each day of the visit. These were titled with the date, location and context of observation. These pages also included short biographical notes about the main informants. The third stage was to use the margins of the A4 paper to add comments and notes, thus beginning the process of analysis. At this point, after each and every visit, I was able to assess the amount of material collected on a particular topic, whether some activities were described more extensively than

others, or if there were any gaps of major significance. Finally, it was then possible for me to consider whether I needed to make any specialised field notes on particular themes, topics, or substantive areas in addition to the general notes that I had taken. In order to create such notes, I designed an *aide-mémoire* (Hitchcock and Hughes, 1995) on the particular topic or area in order to focus attention more sharply. I used this approach, for example, to explore the offices/areas allocated for support staff in both schools, and how students accessed and made use of these spaces.

3.3.6 Interviews

The second stage of my study design involved interviews. The purpose of these 'conversations with a purpose' (Kahn and Cannell, 1957) was to allow me to understand 'the meanings individuals hold for their everyday activities' (Marshall and Rossman, 1994:81). Together with school visits, semi-structured interviews gave me the opportunity to portray the heterogeneity of my informants 'with different attributes, abilities, aptitudes, aims, values, perspectives, needs' (Sikes, 1996:xi). Various categories of staff (managers, teaching and support staff, administrators) were included among the pool of informants. The flexibility of the questions asked allowed some specific questions to be asked of particular interviewees, while others that were less relevant could be left out. This flexible approach to interviewing, together with observations of informants in the 'natural setting' of each school, allowed me to 'make sense of, or interpret phenomena in terms of the meanings people bring to them' (Denzin and Lincoln, 1998:3). Such an approach acknowledges the complexities of the construction of different education models and permits interrogation of the ways people relate to and enact different education policies.

Prior to my first school visit five members of staff (two from Parkview and three from Stoneville) replied to my introductory email and expressed their interest in taking part in the project. The three Stoneville members of staff, I found out later, had been encouraged by their deputy-principal to participate. Interviews were scheduled with these members of staff during my first visit to each school. Once I had visited each school and introduced myself in person to staff, it was possible to identify other volunteers. In total I interviewed 20 members of staff across the two schools (twelve at Stoneville and eight at Parkview). Eight members of staff were interviewed twice, and four were interviewed three times. Not all members of staff who expressed

interest in the study were actually interviewed. The timing of my visits meant this was not always possible (some of my visits took place on days part-time staff were not working, and there were occasionally clashes of schedules). Whenever I was faced with the necessity of making a choice between potential interviewees, I prioritised someone from an under-represented category in my sample. This allowed me to maximise diversity in my sample and include members of staff groups who might be expected to have different perspectives, for example: managers at different levels; teachers of different subjects; long-standing and newer members of teaching staff; as well as union representatives, administrative staff, and other key groups.

The bulk of the interviews targeted two distinct groups of staff in particular: senior managers, and teaching and support staff. Senior managers (principals and deputy-principals) were crucial informants as they provided valuable accounts of how each school had developed their policies following recent reforms, and how these policies worked in practice. Interviews with teaching and support staff gave me the opportunity to delve into school practices and routines in more detail. They were also an opportunity to explore preferred pedagogical approaches and, in doing so, learn more about the aims and ethos of each school.

All interviews were conducted in English. The majority were recorded and fully transcribed *verbatim*. In a small number of cases, five, interviews were not digitally recorded, as members of staff refused to consent to the use of a recorder. However, in these cases, interviewees agreed that I could write notes as I was interviewing them. I also took hand-written notes when I was accompanying informants around school premises, as carrying a recorder would have been disruptive to the interaction, this was the case for example of some second and third interviews with the same informant. In transcribing interviews, I was mindful of not losing any data that later could become crucial for the research. Transcribing myself had the added benefit of ensuring I was familiar with the data, which is, of course, a great advantage when data analysis begins (Fielding and Thomas, 2002). After transcription each interview was listened to again and checked against the transcript to make sure that no errors were made during the transcription process. As some of the informants were not native English speakers, language inaccuracies were sometimes present in the interviews. In order not to compromise the data, I decided not to intervene and correct such inaccuracies in the transcription and subsequent presentation of data in the thesis.

Each interview lasted between 30 and 90 minutes. Most interviews took place on the school premises in staff rooms, empty classrooms or staff members' offices. Some interviews with Parkview staff took place outside the school premises in local cafes, or in the park facing the school. In two cases I carried out small group rather than individual interviews. This happened once at Stoneville (where I interviewed three members of staff together in the school canteen), and once at Parkview (where I interviewed two members of staff together in a café near the school). Those members of staff that were interviewed two or three times were mostly self-selecting. After each visit I asked informants whether I could get in touch with them again if I felt the need or wanted to expand on points discussed in interviews. In one case, I contacted a teacher again and asked her if we could have a second meeting as the scheduled interview was interrupted by her going to class.

3.3.7 Informants

- Senior managers

One principal and three deputy-principals were interviewed. The Principal of Parkview was not available at the time of my visits. The aim of the interviews with senior managers was to find out, in as much detail as possible, about school values and ethos, perceptions and opinions of school policies, and interpretations of equivalence embedded in these policies.

The first tranche of questions for senior managers focused on more general areas, such as how the school approached the curriculum, why certain programmes were offered and the main characteristics of the school ethos. In this initial set of questions, I did not ask informants explicitly about equivalence as I wanted to see whether the term would be brought up spontaneously and in what context. The second tranche of questions focused more specifically on interpretations of equivalence and how equivalence was enacted through school values and practices. As senior managers have a crucial role and extensive autonomy in the current Swedish education system, their views about policy evolution at both central and local government levels were invaluable.

- Teaching and support staff

The second group of informants were teaching and support staff. In the first round of interviews they were asked about their general professional experience at the school, the reason why they were working in that particular institution, and their relationship with students and other members of staff. They were also asked about student and parental involvement in decision-making, and the way staff related to the curriculum and new policy changes. As with the senior manager interviews, I did not specifically use the term equivalence in the first round of interviews as I wanted to see if teachers (the term teacher in this research is used to refer to pastoral as well as teaching staff, see note 1 in Chapter 1) would refer to it spontaneously and, if so, in what context.

Subsequent interviews were tailored to the interviewees, who were asked to expand on points they had made in previous interviews and discuss their general feelings and observations about school practices. Staff members' conceptualisations of equivalence were specifically probed at this stage.

3.4 Data Analysis

In this research elements of a CDA approach were used for the analysis of policy documents (both national and local) and a grounded theory approach informed by CDA techniques for the analysis of interviews and field-notes.

Grounded theory has been widely used in qualitative research and rests on a systematic and continuous method of gathering and analysing data (Bryman, 2001; Charmaz, 2007). Coding of data, by finding common themes and denominators within interviews, is central to grounded theory and crucial in building theories based on findings (Strauss and Corbin, 1990). Coding is used to highlight similarities and differences in answers and outlooks within and between different groups. It is thought to be helpful in the construction of categories within data and in relating these categories to the contexts in which they occur (Robson, 1993). Categories can also be related to each other to create organised structures.

I decided not to use a software package to analyse my interview data and field notes. The number of interviews carried out was such that a manual approach was entirely feasible and this enabled analysis of the transcripts in their entirety. Analysis

was carried out in stages; when new interview data became available these were added to the already existing analysis. The strategy was to build up a more complete picture of events on a continuous basis, adding substance to the existing data corpus, in line with a grounded theory approach.

In the analysis of interviews, as well as letting themes emerge through a grounded theory approach, I analysed the language employed to construct such themes by using some techniques from CDA. For instance, I analysed how certain words were employed in particular syntactical structures whilst others were avoided. I looked at sentence construction, and whether informants positioned themselves as active agents or not in relation to particular topics. For example, I classified the use of active or passive voice, particular terminology (e.g. the use of the word 'foreigners' to describe students from a mixed background), and pre-modifiers (e.g. the prefix 'non-Swedish' to describe certain members of staff, thus positioning them as different from 'normal' staff).

The interview data were for the most part very detailed and rich, so it was necessary to become as familiar as possible with the transcripts. This was achieved by reading through the text of the interviews soon after they had been transcribed, writing down thoughts and ideas about the data in the margins, and gradually comparing and contrasting the responses of different types of interviewees by theme. First, the responses of managers were compared to those of teachers from the same school. Then comparisons were made across schools. In each case, similarities and dissimilarities were noted. This process was repeated as new research themes were identified.

As McTavish and Loether have pointed out (2002:184), the analysis of case study data is often summative in nature: 'weighting the evidence and providing a thick description of the findings'. Following this approach, my overall aim was to produce 'an in-depth story or longitudinal critique rather than a systematic discussion of tabulated data' (ibid.).

3.4.1 Applying Critical Discourse Analysis to data analysis

Concepts and tools drawn from CDA were employed for the analysis of secondary sources in this study and, as outlined in the previous section, to the language used in interviews. This section describes how the core concepts of power-knowledge,

recontextualisation and intertextuality were drawn on as analytical tools in this research.

My analysis of policy texts is influenced by Foucault's conceptualisation of power-knowledge relations, or the way possibilities for meaning are pre-empted through particular social and institutional positions and the discourse inclusions and marginalisations they create. Such a perspective recognises the link between power and knowledge, and the way this plays out in an essentially contested and dynamic policy process. Critical discourse analytic techniques and approaches were applied to the selected policy texts – white papers, curricula, school reports and action plans, school provision policies and *Skolverket* reports. In addition to shedding light on the ideological and political climate that shaped the development and implementation of these policies, this process helped to problematise the concept of equivalence by exploring the outcomes policy texts left out or made ambiguous. Textual analysis also allowed exploration of the interplay between different constructions of equivalence and school practices, and thus the ways in which discourses of choice shape social relations.

CDA aims to offer a systematic framework in which specific aspects of linguistic interaction are linked to specific cultural and social contexts. The concept of the 'knowledge-based' socio-economic order, explored in this study through the lens of 'equivalent' education, suggests that language and its use might perform a crucial role in socio-economic life. If we accept this initial premise, then a critical analysis of language can be a useful element of social research and, in particular, to a study focusing on the shift from equal to equivalent education.

As will be shown in Chapter 4, the term equivalence was used in different texts with different functions, and was fundamentally 'recontextualised' during the course of two decades. Critical discourse analysis has taken the concept of 'recontextualisation' from the sociology of pedagogy of Bernstein (Bernstein, 1990 and 2000), and tried to adjust it to the analysis of discourse. Recontextualisation involves selectivity and filtering devices that control which meanings are moved from one field to another.

Following Jessop (2000), we can specify two aspects of this movement: 'restructuring' (a transformation of relations between different social fields and domains, such as the economy and education or the arts); and 're-scaling' (a

transformation of relations between the local, national, macro-regional and global scales of social life). The significance of language in these transformations has been highlighted by a number of social researchers writing from a critical discourse analytic perspective. Bourdieu and Wacquant (2001:3), for instance, point to a 'new planetary vulgate', or vocabulary (including 'globalisation', 'flexibility', 'governance', 'employability' and so forth) that 'is endowed with the performative power to bring into being the very realities it claims to describe'. These points are evident in the use, across different contexts, of the terms responsibility and responsabilisation, which are considered in Chapters 2, 6, 7, 8 and 9.

Texts are positioned in a complex chain or network of meaning with other texts with which they create intertextual relations. These relations are both 'retrospective' (i.e. with prior texts that have shaped the current text), and 'prospective' (i.e. with subsequent texts that report, represent, and echo the current text). The historical approach to the analysis of equivalence in this study aims to highlight such intertextuality. As Chapter 4 will show, the meaning of the term equivalence has shifted and changed as it has been relocated from the semantic area of pedagogy to that of management and performance by results. In this process of relocation, new discourses are made, as this research aims to show. Analysing policy documents from the late 1980s, it is clear that the overall semantic pattern or rhetorical formation of the texts adopts the 'problem-solution' pattern (Hoey, 2001). In other words, the enhanced flexibility and variety of management models that equivalence allows were positioned as the only and most effective way to solve current and potential future problems in the education system. This phenomenon, which is discussed in Chapter 4, was explored in a variety of ways, including through an analysis of sentence structure and specific assertive phrasing (e.g. use of '*ska* + infinitive' in curricula and local school documents which generally translates as 'shall + infinitive') in Swedish language documents and those available in English translation.

3.5 Ethical considerations

Quality in all types of research involves informed consent and a concern with ethical issues (including anonymity). For this reason, the negotiation stages of this research included circulation of detailed, plain language information sheets and consent forms to the principals, and teaching and pastoral staff I wanted to interview. These documents carefully outlined the rights of participants and my responsibility as a

researcher (discussed in more detail below). In the course of the interviews themselves, I was particularly aware of the need to establish rapport, and demonstrate empathy and respect for the subjects and their perspectives. Perhaps most importantly of all, it was necessary to avoid projecting my own values on to the interviewees or disrupting on-going social relations in my informants' workplace.

This project commenced after official notification of approval was received from King's College London's Education and Management Research Ethics Panel. As part of the application for ethical clearance, I included a clear explanation of the aims and methods of the research and the measures taken to ensure participants were recruited without pressure. Participants' rights, and procedures to minimise risks and hazards to participants, were also highlighted in the information sheets referred to above. Accompanying consent forms emphasised that anonymised results would be used for research purposes only. Institutional approval documents, obtained from school principals, incorporated similar information.

I followed the BERA ethical guidelines (British Educational Research Association, 2011) in relation to my responsibilities to participants. In keeping with ethical considerations about respect, privacy and minimisation of harm, interviews were conducted in private, at a place and at a time suitable to the informants. Each school visit was agreed with the school deputy-principals and arranged at a time of the academic year convenient for staff. As a researcher, I aimed to protect the anonymity of participants. For this reason all participants were assigned a pseudonym. Locations and significant landmarks were also anonymised. Interview audio files, transcripts and field-notes were copied, saved and password protected on a protected computer, in line with data protection legislation and good research practice.

3.5.1 Consent

Ethnographers usually do not give extensive information to people they observe, on the basis that the nature of the work undertaken may change the dynamics of the situation, that a large number of participants may be involved and that it is not always feasible to point out beforehand what will be observed and collected (Burgess, 1989; Brooks and at., 2014). As a result, few ethnographers offer participants a specific 'moment of choice' about whether or not to become involved. Instead, they sometimes presume that 'if their presence is tolerated, if they aren't

told to leave, consent has been granted' (Thorne, 1980:290, cited in Brooks et al., 2014).

With this in mind, I focused in my analysis on field notes from observations of school activities, meetings, and staff and student gatherings where I had obtained the verbal consent of the people present. I decided not to include field-notes I collected during some informal staff meetings or conversations where I had not obtained consent or where sensitive issues about particular students or members of staff were discussed. I also decided not to use information from casual conversations with students, as I had not explicitly sought consent from them.

Something that became clear from my initial visits to the schools was that different countries and cultures have different approaches to ethics; ethical frameworks cannot be straightforwardly transferred from one country to another. During my initial visits, some informants had not read and showed little interest in the information sheet I sent them in advance. Nevertheless, they were still prepared to sign the consent form saying they were happy to participate. One informant I was interviewing, who was also carrying out a PhD at a Swedish University, told me that ethical procedures were less prescriptive in Sweden and suggested that this may be the reason my informants did not think it was important to go through my information sheet and consent form in detail. Notwithstanding this possible explanation, I chose to explain to every informant in person each time I met him/her what my research entailed and that they had the option to withdraw at any time, in line with my commitment to consent as an on-going process, rather than a one-off event.

3.5.2 Ethics and power relations

Establishing and maintaining rapport was a central part of my research endeavour. I tried to establish trust and rapport through an informal approach which, rather than being extractive, recognised the worth of informants as unique individuals, beyond their usefulness to this study. Iphofen takes this approach rather further arguing that researchers should aim for rapport characterised by 'formal informality' (Iphofen, 2009:59). However, Ducombe and Jessop (2002:120, cited in Brooks et al, 2014) have raised ethical concerns about research in which interviewers try to build 'false friendships' with the intention of 'encourage or persuade interviewees to explore and disclose experiences and emotions which – on reflection – they may have preferred to keep to themselves or even 'not to know''. They argue that in some cases, the

need to be a 'good interviewer' in order to produce good data produces what they call the 'commodification of rapport'.

Being mindful of these concerns, and the risks of being perceived as either naïve or patronising, I introduced myself as an ex teacher in the Swedish system (as well as a PhD student), in order to establish a connection based on shared professional identity. During my visits, I dressed like a teacher and followed general school rules, for example, by leaving my shoes in the communal cloakrooms in winter. I also spent time in and around the schools to make my presence familiar. In both schools, after the second visit, staff, and some students, began to recognise me. At Stoneville, students sometimes mistook me for a member of staff when they saw me conversing in the corridor with teachers or school managers – a misperception I corrected whenever I could.

Foucault's work has particular relevance to any discussion of research ethics. Foucault (2000) argues that power is relational, fluid and modifiable. In the context of a research project, this reminds us that all parties hold some power, and power relationships shift and change throughout the process of research. The implication of this is that ethical decisions need to be made not just at the start of a project, but on an on-going basis. Moreover, power is not just a negative phenomenon; it can also be productive (Foucault, 1980). For example, it can be exerted by the teacher and the researcher working together to generate positive outcomes for students. The idea of 'truthful speaking' as central to ethical practice, explored by Foucault in his late work (Gutting, 2013; Robinson, 2013; Brooks et al., 2014) is especially relevant in decisions about how to disseminate research findings.

As a researcher, I experienced a critical tension between reporting my findings accurately, in a rigorous and 'truthful' manner, and ensuring that my participants were respected and protected from harm (Henderson, 2008; Brooks et al., 2014). I wanted to be sure in writing up that informants would not feel betrayed, misread or inaccurately reported (Barnes et al., 2003; Brooks et al., 2014). The problem, however, is that social science research inevitably involves some degree of critique, either of institutional settings or of practices that have been observed. It could perhaps be argued that participants, who must be 'fully' informed about the research, should be made aware of the possibility that it may involve some critical commentary about them, or their social world. I did indeed try to make this clear when I explained the aims of my research to informants.

At Parkview, staff responded quickly to my initial approach by email, indicating that they were either interested in participating or that they had no time to do so. However, on more than one occasion it transpired that on the day of the pre-arranged appointment members of staff had forgotten I was coming to Sweden and had made alternative arrangements. In most cases when this happened staff members invited me to shadow them throughout the day and talk, or offered to talk to me on the phone or via Skype at a later date. The fact that these staff members were happy to let me observe them in an everyday setting assured me that they were comfortable with my presence. However, I was also aware that while shadowing these informants I would, perhaps inevitably, end up observing other colleagues who had not agreed to be part of the study (for example when I was shadowing informants in offices where others were working). Where this happened, I decided not to include certain observations or data in my final analysis.

At Stoneville, the situation was quite different. My first two visits to the school were organised in detail by one of the deputy-principals, who had set up interviews with staff and organised tours of the school for me. In some ways this drew attention to my status as an outsider at the school, although I was welcomed warmly by staff members. Subsequent visits took a rather different course. Although school managers identified a member of staff to be at my disposal during visits to provide information and assistance, I arranged appointments directly with staff, which helped me to establish a positive rapport with them. On several occasions, teachers and support staff at Stoneville told me my visits provided them with a welcome opportunity to get away from their busy routines and have some time to think. My interviews were clearly providing staff with opportunities to reflect on their professional practice and the running of the school.

In all my interactions with informants, I tried to position myself as their 'equal', able to share with them an understanding of their professional context derived from my past experience of the Swedish curriculum and school year. Nevertheless, as Barrett (1996) puts it, not being part of their world on a day-to-day basis made it 'difficult for me to perceive the taken-for-granted assumptions on which that world was built'. Introducing myself as both an ex-teacher and a current student was helpful in the sense that it put my interviewees in a position of 'superiority' in terms of holding information and perspectives I could not access unless with and through them.

3.5.3 Reflexivity and value neutrality

As a research 'instrument' (Janesick, 1994:212; Marshall and Rossman, 1995:59) the presence of the researcher 'in the lives of participants is fundamental to the [qualitative] paradigm' (Marshall and Rossman 1995:59). As highlighted above, the decision to carry out this research in Stockholm, where I had worked as an upper-secondary teacher for several years before moving to England in 2009, was driven by personal and professional experiences and my interest in the increasingly visible impact of market economics on Swedish schools and school policies. However, the experiences and value positions that fuelled my initial interest in this topic created some difficult and complicated ethical issues when it came to data collection and analysis.

The conventional response to dealing with these issues is that researchers must work carefully in their analysis to ensure that they take an objective approach towards accurately recorded data. According to Hammersley (2003, in Brooks et al., 2014) holding particular views and inclinations as a researcher does not necessarily translate into biased research accounts. However, the problem is that it is very difficult to divorce analysis from values. In the case of this research, I was concerned that my personal beliefs, values and attachments may lead me to search for what I thought *should* be in the data, rather than to find what was actually there. I was concerned I might get involved in a form of analysis in which I tried to justify my beliefs rather than subjecting them to scrutiny.

However, reframing the issue, Ransome (2013:74) argues that 'the idea of theory free or pure data is just as silly as the idea of data free or pure theory' (cited in Brooks et al., 2014). Taking this argument still further, Ladner (1987:74) questions why anyone would 'think it is good to be objective: indifferent, disinterested, dispassionate, value neutral' (cited in Marshall and Young, 2006). In my research I have tried to deal with problems of rigour and interpretation in data analysis

by explicitly detailing the analytic process, documenting any data editing and insisting that 'the boundaries of inference should be clearly delineated' (Kromrey, 1993:25, cited in Brooks et al., 2014)

Further difficulties derive from the wider recognition that texts are open to multiple readings (Burr, 2003; Reiss, 2005; Brooks et al. 2014) and 'truth' is a social construction that comes out of a critical interplay between positions, power and reflexivity. Striving for accuracy, credibility and trustworthiness in how findings are

presented is not often a straightforward process. It is riven with ethical concerns. The processes involved in the in-depth interview are not (and can never be) neutral, objective and unbiased because interviewer and respondent are actively engaging with each other. As this process of interaction involves a mutual construction of the topics under discussion, both participants in this dialogue need to be reflexive (Nicolson, 2003). After considering all these issues, I decided to adopt the approach of Clair Ballinger (2003) and started my final analysis from a social constructionist perspective. I decided that the answers I was given as a researcher needed to be read in a particular way, so, for example, 'my developing interpretation increasingly attended to the service user accounts [or in my case school staff] as representations of competency, lucidity and fitness designed to counter possible negative evaluations [of their practice]' (Ballinger and Pain, 2000). By creating the space to explore these interview accounts and their possible functions, I was also able to critically consider my own role in the production of the data.

In discourse analysis the processes of 'analysis' and 'writing up' research are closely related, sometimes overlapping. The analysis of discourse, as in the case of any form of writing, reflects specific choices on the part of the researcher/author (Harper, 2003). Having adopted a social constructionist perspective according to which meaning is negotiable, I reflected on the potential risks of attributing specific meanings to the language used by my informants that they might have not have intended (Coyle, 1995). As highlighted above, I tried to tackle this issue by not mentioning at first particular key words that were relevant to my research, such as equivalence, to see if and how informants would include them in conversation and the meanings they would attach to them. I then looked for recurrence of key words and expressions and analysed the context in which they were used to see if these contexts were the same across schools and different members of staff.

A common criticism of traditional approaches to grounded theory from a discourse analysis perspective is that themes are generated by the researcher rather than emerging from the data. I was aware that the process of coding and the categories generated by it changed throughout the course of my research, and that my ideas about the connections between categories changed too. In the end I selected three broad themes as focal points for the analysis of the interview transcripts: organisational aspects of the schools; assessment; and the role of teachers. I am able to explain and support this choice in relation to the aims and focus of this research, however I cannot avoid the fact that a choice was made.

I am also aware that 'my writing was influenced by the need to develop a coherent, consistent and linear argument, or to tell a particular story' (Stainton-Rogers, 1991). Stainton-Rogers (1991:10, cited in Finlay and Gough, 2003) notes that the implications of telling a story are that which is told is 'a distorted and particular version that I have deliberately constructed for you in a particular way, for particular reasons'.

Mindful of these concerns, I tried to adopt a rigorous and systematic approach to the texts I analysed, as described above. The rigour was tested through additional forms of data analysis (e.g. by counting key terms and using tools from critical discourse analysis to explore language structures and vocabulary, as outlined in this chapter). These practices helped to validate my analysis and indicate the influence of key concepts, the use of a particular strategy, or the dominance of a particular perspective through detailing its occurrence.

3.6 Conclusions

While theory might serve a problem-solving function, it is the more reflective critical theory that informs my project. Critical theory challenges social and power relations. I have been aware of the ways this questioning extends to my own 'moral vision' as a researcher.

Ozga highlights how research informed by critical theory can potentially contribute to greater freedom from arbitrary, coercive power. Such concerns may seem 'rather abstract and grandiloquent' (Ozga 2000:47). However, by exposing the effects of policy on the ground, such research can explore how injustices and inequalities are produced, reproduced and sustained, and suggest how they may be challenged and overturned.

This chapter described the main theoretical and methodological approaches underpinning my research, the rationale for my choice of case study sample, and the main ethical dilemmas I faced during data collection and analysis. Some of these themes will be reconsidered and further developed in the data analysis chapters that follow.

Chapter 4

Swedish Education policy: 1950-2011

4.1 Introduction

Following on from the theoretical consideration of equality in Chapter 2, this chapter outlines the development of Swedish education policy from 1950, when the comprehensive school system was introduced, to 2011 when the most recent reform of upper-secondary school was implemented. The chapter charts the key moments of transition from a highly centralised model, to a decentralised one, and finally to the current re-regulated model based on quality assurance.

The first part of the chapter presents a general overview of Swedish education policy. The second part offers an analysis of key policy documents, informed by the methodological approaches described in Chapter 3. This analysis centres on shifts in the meaning of key terms, focusing specifically on the concept of 'equivalence' and its relationship to equality.

4.2 Swedish education policy and the introduction of the Voucher Reform: an overview

The creation of a comprehensive school open to all regardless of location (city or countryside), social class or gender was a central commitment of modern welfare society in Sweden in the early 1950s (Bunar, 2010). Yet, over the past 30 years, no other industrialised country has restructured education as rapidly from a centralised system to one in which there is complete freedom of choice between municipal and privately managed schools financed with public funding (Blomquist and Rothstein, 2000).

The creation of a comprehensive school system was consolidated in 1962 with the implementation of a new national curriculum. The introduction of subsequent curricula in 1969 and 1980 was accompanied by an increase in central state planning, state governance and funding. However, by the end of the 1970s a number of national reports began to voice criticisms of the public school system from scholars, teachers, parents and the Swedish Conservative Party (Lundhal, 2002; Arnesen and Lundhal, 2006; Bunar, 2010). These criticisms, which will be explored later in the chapter, sparked a new discourse of school reform. However, they did not lead to actual reform at that time, as a strong economy, rising living

standards, and a free higher education system that promoted social mobility (Trondman, 1993) legitimised the continuation of a centrally planned approach. However, between 1989 and 1992 changes were introduced and accelerated rapidly, due in part to the most dramatic economic crisis the country had faced since the Second World War, and also to a political shift that brought a liberal-conservative coalition to power in 1991 for the first time since the mid-seventies. These events laid the economic and political foundation for a reformed school system (Aasen, 2003).

Whitty et al. (1998) suggest that the reorganisation of the Swedish school system which began in the late 1980s and early '90s was characterised by three defining features: managerial and financial decentralisation to local authorities (municipalities) and schools; increased parental influence on schools through the introduction of vouchers and choice (Englund, 1994); and the adoption of a new curriculum in 1994 focused on steering by objectives (supported by guidelines on the objectives schools were expected to attain). The 1994 curriculum also gave more emphasis to school evaluations and inspections, which were among the tasks assigned to *Skolverket*, the new National Agency for Education.

A further, important reform of upper-secondary education was implemented in 2011, which added a specific focus on assessment and teaching qualifications. This reinforced the 'steering by objective' philosophy at the heart of the 1994 Curriculum and enhanced accountability in international comparisons in line with other European countries (Sundberg and Wahlström, 2012). The 2011 reform also expanded the number of national study programmes schools were permitted to offer, and abolished the personalised study programmes they had formerly been allowed to provide, as will be explained in section 4.2.5.

These reforms will be explored and analysed in detail in the section 4.3 of this chapter through the analysis of key policy documents, but to contextualise that analysis I will first provide an overview of the key phases of Swedish education policy reform since the 1920s.

4.2.1 1920-1950. The introduction of the nine-year comprehensive school

Back in the 1920s, the idea of a school open to all was already on the agenda of some radical and influential groups in Sweden, such as worker unions. However,

the idea was not seriously considered in official circles until the 1940s, when a School Committee was formed to review the school system. The Committee was constituted by an expert body that worked under the supervision of Professor Elmgren from the Department of Education and Psychology at Gothenburg University.

The Committee spent the few years prior to 1946 collecting factual information and expert opinion on both the Swedish school system and on international models. At this time, schooling in Sweden was predominantly selective and controlled by the church. After compulsory elementary school lasting two years, students continuing in formal education attended a selective grammar school for four years, followed by either three years at an academic *gymnasium*, or two years at a vocational lower-secondary school. As Boucher highlights, the major question in the 1940s was how students could transfer between these two post-compulsory systems, which coexisted side by side during this period (Boucher, 1982:19).

The School Committee's first report was released in 1946 with the title, *School in Service of Society*. The report promoted the idea of a democratic school, whose role was to shape future citizens by exposing them to new teaching methods and a comprehensive environment.

The most important purpose of the school will be to educate democratic pupils [...] This does not imply uniformity [...] [A] democratic school must be an environment for the free development of children [...] for whom cooperation is a need and a pleasure. [This] presupposes an alteration of teaching models (from those which) develop dependence and belief in authority and passivity [...] [to those which] develop independence and critical attitudes in the pupils. A democratic school has to accept this programme and has to be many sided, offering to each young person that educative process best suited to his aptitudes and appropriate for his future life. (School Committee, 1946:31)

This quote is particularly interesting because reference to an alteration in teaching models, already present in 1946, would become a golden thread running through education policy discourse in the following decades. The idea that school education 'does not imply uniformity' would lead to the introduction of the term *equivalence* in the early 1980s (at that time implying retaining the values of equality, while allowing an element of differentiation in pedagogy). The quote also indicates that the original aim of the Swedish school was to create good democratic citizens. The initial curricula had a crucial role in this respect, as will be shown later in the chapter. In 1950 the Swedish government implemented a nine-year pilot project to trial the new comprehensive school proposed by the Committee. The main elements of the pilot were: a nine-year comprehensive school up to age 16; the abolition of exams

and selection (to be replaced with election of different courses); and a child-centered pedagogy. Specialisation into different pathways was largely postponed until the end of the compulsory school period.

As Boman (2006) has pointed out, the School Committee's vision of education was concerned with shaping future citizens. In the Committee's final report (SOU - *Statens Offendliga Utredningar* [Official State Report], 1948:27) democratic citizens were conceptualised as 'free, rational and self-reflective' individuals, who demonstrate mutual solidarity.

Democracy is based on the co-operation of all citizens, which requires free personalities. It is the primary aim of schools to nurture democratic individuals. In a state built on public sovereignty, citizens require ability to reason self-critically, to be independent thinkers. Democracy has no need for people who lack independence.

(Official State Report, 1948:27:3)

The purpose of education was to create such 'free personalities'. The work of school was not therefore simply to develop pupils' knowledge and cognitive abilities, but also to enhance their awareness of contemporary society and its cultural, social and ethical dimensions. This idea of education as citizenship apprenticeship was to be central to the development of education policy until the 1990s. So too was the idea of the 'free personality' of citizens, which was central to initial conceptualisations of 'equivalence'.

4.2.2 1950 – 1975. The Swedish comprehensive school system

The nine-year pilot was judged a success and the comprehensive school reforms were included in the School Act of 1962.

The school reforms were launched under the dual banner of equality of opportunity and the formation of citizens for a modern pluralistic and democratic society. The first goal was conceived within the framework of the classical liberal philosophy of equality. Everybody should be put on the same starting line and begin the race for a life career on equal terms. Differences in school attainments would thereby reflect who 'by nature' was better or worse than the others. From the policy point of view everybody should be given the opportunity to progress in the formal (selective) system according to his or her ability (and motivation) independently of place of residence and parental background.

(Husén, 1986:160)

As noted in the discussion in Chapter 2, the Swedish comprehensive school system was initially based on distributive notions of equality. By giving all students the right to access a common school and curriculum irrespective of their geographical location or social status, equal opportunity would be guaranteed. A new national

curriculum was introduced in 1969, centered on a radical model of child-centered pedagogy. This embraced ideas of relational equality by challenging traditional boundaries in the teacher-pupil relationship. The first curricula (*Lgr69* and *Lgr80*) were not divided into traditional academic subjects and did not include prescriptive assessments, but were shaped around topics considered relevant to students' lives and experiences. In doing so, these curricula embodied the founding principles of the 'democratic curriculum' described by Connell in the mid 1900s and re-constructed in the Porto Alegre democratic school, as outlined in Chapter 2.

The 25 years between 1950 and 1975 constituted a period of political stability, in which social democratic governments led the country without interruption. Stability created the conditions that made it possible to implement commitments to equality of opportunity in education and in other areas of social policy. The labour market was populated with well-functioning organisations and benefitted from productive relationships between employers and unions. Full employment was accompanied by a solid system of social security, including generous pensions and child allowances (Heclo and Madsen, 1987). Education reforms were reinforced by additional forms of support, such as free school meals for all, health programmes, free learning resources, and scholarships and loans for higher education.

However, by the early '70s the comprehensive school system began to attract criticism from both ends of the political spectrum. In fact the entire so-called 'Swedish model', characterised by institutionalised collaboration between employers and trade unions (Rothstein, 1998), became the focus of criticism (particularly from conservative parties) for its supposed inefficiency. Critics argued that what they regarded as centralised micro-management was standing in the way of individual initiative, and preventing citizens from having their say and participating in public life (Boréus, 1994). A number of official reports, which will be analysed later in this chapter, constructed this criticism in terms of calls for a new 'small-scale democracy' (Englund, 1994a, 2005), and individual initiative and participation became an intertextual 'golden thread' running through social policy documents in that period. During these few years, the contours of a 'new Swedish model' were shaped. This model placed greater emphasis on individual citizen participation in public discourse (Official State Report 1994:44, *The Study of Democracy and Power in Sweden - Demokrati och makt i Sverige*) and, as Premfors put it (2000:175), combined 'continued and further-elaborated welfare policies with a marked decentralisation of politics and administration'. Social justice and distributive conceptions of equality became marginalised themes in public debate, whilst the

term democracy was repositioned to signify individual rather than collective contributions to public life.

The comprehensive school system attracted particular criticism from conservatives, who considered it too expensive and inefficient (Lundhal, 2002; Englund, 2010). However, social-democrats also began to problematise the school system (as signalled in Chapter 2) as well as the concept of equality of opportunity, when it became clear that the curriculum did not necessarily lead to equal outcomes. Upper-middle class students were still considerably more likely than their less well-off classmates to continue their education at university level (Husén, 1986). The Swedish comprehensive school system, built on the notion of equality of opportunity and embracing both relational and distributional conceptions of equality, seemed to be failing in relation to equality of outcomes.

In this context, a different conceptualisation of equality had to be found. Social democrats returned to the 1946 School Committee and its focus on democratic schools that respected students' individuality and developed their independence. This richer and more complex definition of equality, which shaped early notions of 'equivalence' in the late 1970s and early 1980s, resembles the idea of equality of freedom to achieve 'functionings', subsequently elaborated in the 1990s by Sen (1992) as equality of capabilities.

4.2.3 1975 – 1990. First attempts at decentralisation

In 1976, the first conservative government was elected after a long period of uninterrupted social-democratic control. This change signaled the beginning of a new political and economic situation. The oil-crisis hit the national economy, and in the 1980s a number of tax reforms were introduced to reduce tax commitments for middle- and high-income earners, dramatically decreasing state revenues.

Responding to growing criticisms of the 'Swedish Model', the Conservative Party and the Swedish Employers' Confederation introduced a new education discourse centred on individual choice, competition and excellence (Lundhal, 1990). These terms appeared in a number of policy documents and debates, creating strong intertextual links within a common discourse of effectiveness. The terms were constructed as part of a 'problem-solution' strategy (Hoey, 2001; see Chapter 3) designed to renew Swedish economic growth and secure international success. Schüllerqvist's (1995) analysis of parliamentary debates on education during the

late 1970s and early 1980s reveals some of the main concerns and tensions that were to shape demand for significant reform in the late 1980s and 1990s. As will be analysed later, one of the most influential reports published at the time, *The Study of Democracy and Power in Sweden* (Official State Report 1990:44), positioned radical school reform as the essential foundation for a new education system that would promote individuality and entrepreneurship, rather than solidarity and democratic citizenship (Lindblad and Wallin, 1993). Some of the key changes proposed at this time included creating boards in every school, with wide representation from all stakeholders (teachers, parents and students), and introducing continuous monitoring and assessment of schools (Lundahl, 2002). In education, as in economic policies, a discourse based on international comparison (outlined in Chapter 1 and 2) as the main paradigm for assessing the quality of schooling started to take hold (Sedel, 2004; Bergh, 2011). A 1979 report from OECD highlighted the comparative decline in Swedish students' achievement and criticised the uniform nature of Swedish education, amplifying conservative critiques of the comprehensive school system.

In 1978 a new funding system was introduced, which gave greater financial autonomy to municipalities and created municipal school budgets, giving local areas more scope to influence school policy and performance. The Conservative School Minister, Mogård, stated a few years later: 'With this system of state subsidies, we have carried through the largest decentralisation ever in the field of education, perhaps on the whole the largest decentralisation from the state to the municipalities' (Mogård, 1981:109, cited in Lundhal, 2002). Despite the resistance of teachers' unions (Schüllerqvist, 1995), decentralisation went ahead. In 1989 employer responsibility for school personnel was transferred from central government to municipalities, whilst responsibility for salary negotiations was handed over to individual schools. Similar decentralising measures were seen in healthcare during these years (Bergman, 1998; Bergström, 1992), demonstrating the intertextual trajectory of policies of devolution from the central state to local authorities.

4.2.4 1991 – 1998. Peak of decentralization

At the beginning of the 1990s Sweden experienced the deepest economic recession since the Second World War. At the same time the country was undergoing significant demographic change, with the depopulation of rural areas and inward

migration (in particular by political refugees). Urban areas became increasingly segregated, and immigrants and lower educated people were hit especially hard by unemployment. The economic condition of single mothers and other vulnerable groups also worsened considerably (Thörn, 2012).

During the crisis, the decentralisation of the political system accelerated. The so-called 'state monopoly' was broken (Boréus, 1994) with the implementation of choice and market-oriented reforms, aided by an important tax reform which offered incentives for private business, including incentives to run schools, as will be shown. New reforms were also introduced in housing, accelerating the privatisation of not-for-profit higher quality dwellings in city centres, whilst suburban areas became mostly inhabited by low-income families and ethnic minorities (Heclo and Madsen, 1987; Beach et al., 2011; Thörn, 2012).

In 1992 the conservative government began to actively promote the establishment of independent schools and approved a School Voucher Reform that allowed private companies to apply to start schools with public funds (Government Bill 1991/1992:95; 1992/1993:230). Education funding was delegated almost completely to municipalities². Foucault's account of the power-knowledge relation (see Chapter 3) is very useful in the analysis of documents from this period, helping to highlight both new 'possibilities for meaning' of the term decentralisation, which was increasingly constructed as the 'only way forward' in a number of policy areas, and the marginalisation of other terms that previously featured centrally in policy documents, such as collective responsibility and equality. When, in 1994, elections were won by the Social Democratic party, reforms continued apace, since decentralisation and quasi-markets in education went largely unquestioned at the time (Arnesen and Lundahl, 2006; Bunar, 2008).

As Bunar (2008) has pointed out, independent schools (*friskolor*) were supported by all Swedish political parties when they were introduced in the early 1990s, although for different reasons. Conservative support reflected a neo-liberal perspective, focused on endorsement of unregulated competition between institutions, involvement of parents (conceptualised as consumers) in school life, and freedom of choice. These principles were seen as the only way to improve education. In contrast, the Social Democrats argued that free-schools would encourage the

² An OECD report from 1998 pointed out that the Swedish education system went from being one of the most centralised to one of the most decentralised within the space of a few years.

development of alternative pedagogical methods and personalised study programmes, while putting minimal resource pressure on municipal schools. Moreover all political actors considered independent schools to be a crucial means of increasing parental involvement and, in the case of faith schools, preserving families' cultural and religious identities (Englund, 2003).

In line with the idea of small-scale democracy, advocated in *The Study of Democracy and Power in Sweden* (Official State Report 1990:44), the notion of equality of opportunity became problematised during these years. The idea that all students had the right to the same education, oriented towards citizen apprenticeship, was replaced with the idea that everyone should be given a chance to develop and fulfill their own personal interests and talents. Education was starting to be conceptualised as a private investment detached from citizenship.

Under the social-democratic government, the primary and secondary curricula were revised in 1994. The new curricula emphasised the role of objectives and results and introduced 'equivalence' as a foundational principle for Swedish schools. This change will be analysed later in this chapter. Pre-school education also became more formalised and a goal-based curriculum for this phase was approved in 1998. Such trends reflected the wider international school-improvement movement discussed in Chapter 2, and highlighted the growing influence of discourses of international comparison and results-based accountability on Swedish education.

Building on the implementation of the 1994 Curricula, the 1997 report of the Swedish School Committee, *School issues: On schools in a new age* (1997:121), focused on concepts such as individual freedom and responsibility. The 'common framework for all', central to government bills from the early 1980s, was replaced with a framework of 'partnership' (Dahlstedt, 2009), by which was meant free, bottom-up involvement of individuals in specific contexts, such as schools and local communities, as showed on page 55 of the report (cited in Dahlstedt, 2009).

Developmental strategies cannot proceed from an assumption that the job is actually going to be done by other people. This means that the self-evident starting point for all developmental work is found in the people who are involved in the activity in question, their actual experiences and their desire to develop these experiences.

Magnus Dahlstedt (2009) analysed the 1997 report from the perspective of 'governmentality' developed by Rose (1996). In the 1997 report, Dahlstedt argues the labour market was constructed as central to both schools' and students'

development, as it was in the case of Swedish language provision for immigrants (as outlined in Chapter 2). Students had to be prepared to formulate future plans by taking into account different opportunities that were on offer and by creating new opportunities for themselves. The discourse of partnership (Dhalstedt, 2009), which can be traced intertextually in a number of social policy documents (see Jacobsson, 2004 and Bengtsson and Berglund, 2012 on employment policy and Petersson, 2012 on healthcare), led to an even more radical shift of social responsibility from the state to the individual citizen.

Following the introduction of the 1994 curriculum for upper-secondary education, 'entrepreneurship' was gradually given more emphasis in teaching (Holmgren and From, 2005). The Confederation of Swedish Enterprise (*Svenskt näringsliv*) and, earlier, the Swedish Employers' Confederation (*SAF*) had insisted on the idea that professional success depends on individual responsibility, even through self-employment. By 2006, nine years after the 1997 report was published, the elected conservative government was repeatedly emphasising that 'entrepreneurship' was one of the topics that needed to be given greater prominence in future iterations of the national curriculum. During the same period, as outlined in Chapter 2, 'employability' became a key concept in labour market policies. An intertextual analysis of such documents shows how certain terms and ideas travelled between policy areas within a 'problem-solution' framework (Hoey, 2001) that marginalised alternative constructions of both problem and solution (in the case of the labour market, for example, previous policies of full employment).

Along with individual responsibility and entrepreneurship, parental involvement was also a central topic in the 1997 report. As highlighted above, from the early 1990s parents' role as active partners in schooling was strengthened in many ways, including through facilitating the founding of faith and ethnic minority independent schools (Dahlstedt, 2008). However, Vincent (2000, writing in the context of the UK) and Bunar (2001, writing about Sweden) have shown how collaboration between parents and schools often rests on particular paradigms of positive parenthood, disadvantaging and devaluing those, for example, constructed as 'immigrant parents' (as outlined in Chapter 2).

By the beginning of 2000, the notion of 'equivalent education' was central to the way the Swedish education system was organised - and to the way it was constructed in policy discourse (as will be explored in more detail in section 4.3). Independent

schools enjoyed great freedom in terms of the programmes they offered, as well as the regulations they were subject to (concerning premises, equipment, record keeping and staff). The market for independent schools was flourishing, particularly in upper-secondary education, as new actors entered the market encouraged by local political support for privatisation and the presence of interested communities, now conceptualised as clients (Böhlmark and Lindahl, 2008).

4.2.5 2000-2012: coexistence of municipal and independent schools

After many years of government support for independent schools (*Skolverket*, 2012), the 2010 Education Act introduced changes to put them on a more equal footing with municipal schools with respect to regulation, curriculum, record-keeping, premises and teaching staff. These changes followed concerns about increased costs for municipalities (Lindbom, 2007 and *Skolverket* 1999, 2004 and 2008) as the education budget had to be shared among a larger number of actors, while municipal schools still had to maintain certain education standards, employ staff holding official qualifications and accept every child in their local area. The changes were also prompted by concerns about working conditions for contracted staff in independent schools (*Skolverket*, 1999 and 2004), and about quality in independent schools, which manifested itself in poor teaching, grade inflation, and inadequate management of resources (*Skolverket*, 2006; Henrekson and Vlachos, 2009; Fredriksson, 2009).

In terms of regulation, the 2010 Education Act levelled the playing field for municipal and independent schools. This was one of the aspects of the document that was given prominence by the media. With this act, independent and private schools were subjected to the same curricula, and requirements regarding timetabling (in primary school), teacher education and premises. Both types of school now had to have a library and a student counsellor. Both had to keep records of student performance and results. The Education Act demanded that schools monitored closely the activities of students and staff. Finally both kinds of school had to undergo the same system of school inspection. This involved a general inspection every four years, and thematic inspections if any aspect of school life was flagged up as problematic during this general inspection. This focus on inspection and external accountability marked a shift in education policy, from the deregulated system of the 1990s to a new era of re-regulation.

Alongside the 2010 Education Act a new reform of teacher education was implemented.

The government report *A sustainable teacher education* (2008:109), and the subsequent bill, *Top of the class* (Government Bill 2009/10:89), both promoted a notion of teaching as an activity requiring subject expertise above all else and oriented towards knowledge/content transmission. The broader dimensions of professional expertise that had featured in the previous curriculum for teacher education, such as the theory and philosophy of education, were reduced to about 20% in the new curriculum (Alexandersson, 2011; Beach and Dovemark, 2011). Teachers' professional knowledge was now repositioned as subject competence as well as communication techniques and skills in the management of group dynamics.

In its simplest terms teacher education is seen as consisting of two parts: first knowledge of the subjects [...] and second knowledge about how teaching is shaped in relation to pupils' learning [...]. These two parts have different research conditions. Subject studies are not abridged copies of scientific disciplines [but] should be built on this scientific knowledge.

(Official State Report 2008:109:375, cited in Beach and Dovemark, 2011)

From a previous, broad, model of teacher education informed by educational, sociological, philosophical, political and ideological perspectives, the report seemed to be introducing a more limited, narrower model with a focus on measurable skills and professional training (Zeichner, 2010; Apple 2013). In their analysis of the government bill *Top of the Class*, Beach and Bagley (2012) make reference to Bernstein's (1990) distinction between horizontal and vertical discourses in relation to university-based professionalism. For Beach and Bagley, the reduction in the common core of 'educational science' in the programme for teachers' education, and the greater precedence given to subject specialism, represents a clear reduction in vertical discourses and an increase in horizontal discourses. According to the authors, subject specialism is an integral part of horizontal discourses developed outside of academia and promoted by lobby groups (such as employers' organisations and private companies) that are entering education as school owners and controllers in pursuit of private profit (Beach, 2010). The new format of teacher training, focusing specifically on subject expertise and class management, and the reform of the upper-secondary school curriculum, presented below, embodied another strong, intertextual link. In both cases teaching and its outcomes were conceptualised as quantifiable and independent of context and culture (Sundberg and Wahlström, 2012), with a strong focus on results and effectiveness. The need to compete and flourish in international comparisons drove these changes. As

mentioned earlier (see Chapter 1), OECD reports and PISA results were seen as central evaluative tools for Swedish schooling in political debates during the 1990s. What is more, the ‘culturally independent’ curriculum introduced by the 2011 reform of upper-secondary education was seen as easily adapted to the different education approaches of individual, equivalent schools branding themselves as international, as the case studies in this research will show.

As mentioned in the previous paragraph, a new reform of upper-secondary education was implemented in 2011 (*Gymnasiet skola 11* - Government Bill 2008/9:199). This created a clear distinction between academic and vocational programmes and, in so doing, marked a break with 40 years of education policy (Lundahl, 2011; Alexandersson, 2011). Since the introduction of a comprehensive school system, Sweden had avoided as much as possible making a clear distinction between academic and vocational paths in the upper-secondary system. Up until the 2011 reform, upper-secondary education consisted of 16 national study programmes, 14 of which had a vocational dimension. In addition to these national programmes, municipalities and schools were free to develop specific programmes for their particular local area or individual school. All programmes, whether national or local, had a common core of cross-programme subjects such as Swedish, English and Maths. These core subjects ensured that all students were qualified for university entry.

In the 2006 election campaign, the conservative and liberal parties, who went on to form a coalition government, announced their intention to separate academic and vocational programmes and to introduce a third education path – a flexible apprenticeship training – in order to facilitate monitoring and accountability. The 2008 parties’ proposal (Official State Report 2008:27) challenged the core body of subjects previously offered by upper-secondary schools and suggested significant cuts in the academic component of vocational programmes.

One essential feature of the subjects that we propose should be common to all upper-secondary education and be included in all programmes is that their scope and content can vary between the various programmes. We therefore suggest that the concept of ‘core subjects’ should be removed from upper-secondary education.
(Official State Report 2008:27:62)

In the new upper-secondary system brought into being with the 2011 reform, local and personalised programmes were abolished in line with the government’s commitment to enhance ‘equivalence’, understood as attainment of nationally

determined objectives. Following the reform, all programmes offered across the country were national and schools were held accountable for and regarded as comparable in terms of their provision.

The reform placed great emphasis on the role of employers in influencing the vocational and apprenticeship programmes. As Nylund put it, this seemed to be a labour market as much as an education policy agenda (2010).

Big changes are needed including the introduction of clearer responsibilities for school Principals. Closer ties between schools, employers and higher education must be put in place. These three actors must participate in the implementation of new objectives. (Official State Report 2008:27:319)

Terms such as 'employability' and 'entrepreneurship', which already featured in other documents, created a solid intertextual link between policies that shifted the role of upper-secondary education from forming citizens to shaping the future workforce for a competitive international market.

In 2011, alongside the reform, a new curriculum for upper-secondary schools was implemented. This introduced a number of important changes from the 1994 Curriculum including the programmes offered, as well as the grading system. The curriculum introduced 18 new programmes, 12 vocational and 6 academic. The reform removed some of the subjects previously included in the academic programmes, for example, the study of foreign languages at beginner levels, drama, arts and other aesthetic subjects. Only 'advanced' courses, by that meaning academic 'content' courses, were now recognised as valid for university entry. The 2011 Curriculum also replaced the previous grading system based on four grades (MVG [special distinction] – VG [distinction] – G [pass] – IG [fail]), with a European-style system (grades A to F), with more specific performance criteria to assess students' work. The introduction of the new grading system was crucial in reinforcing the concept of international comparison and the role of influences and models from other countries. Both were designed to facilitate better integration into international markets and success in international league tables (Sundberg and Wahlström, 2012).

Following the reform, in 2012, *Skolverket* published two reports, one outlining resource allocation, and the other mapping the student population in the upper-secondary system (*Skolverket*, 2012a and 2012b). Although the new national programme portfolio was intended to make all schools 'equivalent' in the market, the reports suggested this aspiration was undermined by geography. The highest

concentration of independent schools was found in large municipal areas, whilst very little choice was available to students living in rural regions of the country. The reports also suggested that municipal schools were responding to the threat from independent schools by enhancing cooperation amongst themselves, for example sharing courses and staff in order to deal with budgetary difficulties.

Having outlined the development of education policy from the introduction of the comprehensive school system to the current day, the second part of this chapter will explore how the concept of equivalence was constructed in key policy documents.

4.3 Document analysis

This section analyses a number of policy documents, including curricula, government bills and official state reports, in order to explore in more detail the changes that led to the Voucher Reform and the differentiation and decentralisation of the school market in Sweden. Each set of documents presented here was important because it promoted a particular conceptualisation of equivalence. Some chronological overlap is present in the analysis below, as the evolution of different constructions of equivalence did not always follow a linear path. Study of these texts illuminates shifts in how the term equivalence was deployed and recontextualised (Bernstein, 1990) from the semantic area of pedagogy to that of management and quality control. It also reveals intertextual connections between the introduction of the term equivalence (a term allowing flexibility and devolution of responsibility to individual schools) and decentralisation and devolution of responsibilities in other policy areas, outlined in Chapter 2 and earlier in this chapter. Finally, from a Foucauldian ‘knowledge-power’ perspective, the study of these texts suggests that post-1992 constructions of equivalence and, later, of internationalisation (see Chapter 5), embodied particular institutional positions that reimagined education in instrumental terms centred on concerns about performance and competitiveness.

4.3.1 1969-1988: *equivalence as respect for students’ individuality.*

The word equality (*jämlikhet*) featured in the first two comprehensive school curricula (1969 and 1980) as one of several founding values (*grundprinciper*) of schooling. By this was meant equality of all human beings, equality between men and women, and equality between different groups in society. Both the 1969 and 1980 curricula stated that compulsory education was aimed at all children and

everyone had to have *equal* (*jämlik*) access to it. The 1969 Curriculum affirmed that schools had primary responsibility for assessing students' background and personal circumstances and determining if resources needed to be redistributed to tackle barriers to learning, such as physical disabilities or challenging family circumstances. 'Of greatest importance is to level differences in standards which may exist between home and school' (1969 Curriculum:11). The 1980 Curriculum added that all children had to be given equal opportunities (*lika möjligheter*) to further their post-compulsory education 'regardless of gender, place of residence, social and economic conditions and other external conditions' (1980 Curriculum:14). The 1969 Curriculum established a clear connection between the idea that children should be exposed to a variety of different pedagogical approaches (from the 1946 School Committee report), and the notion of education as a social right that enabled pupils to become active participants in society. The idea of a democratic school was featured throughout the 1969 Curriculum, linked to the value of a comprehensive environment:

A democratic school must be based on a sense of community, cooperation, responsibility and self-discipline [...]; this is best done in comprehensive classes that offer a diverse social environment, which is an example of good community. (1969 Curriculum:17)

The 1980 Curriculum emphasised, in addition to these things, the importance of a comprehensive setting for promoting democratic values by giving pupils the right to choose activities that best suit their interests and skills. Children were positioned as future citizens (*framtida medborgare*), and the responsibilities of school to society were evident in goals such as: developing the ability to empathise with others; facilitating immigrants' integration; and raising awareness of how to act respectfully in a multicultural society. As mentioned in Chapter 2 and highlighted above, the early Swedish curricula embraced a distributional as well as, from 1980, a relational conceptualisation of equality.

Drawing on the helpful curriculum classification offered by David Scott (2008), the 1969 Curriculum can be considered an 'innovative pedagogical experiment'. Subject divisions and topics were not pre-set, but rather continuously reassessed according to social changes and shifting needs. 'Changes in the cultural and social situation lead to the question of which fundamental education content is appropriate. This content needs to be reconsidered from time to time' (1969 Curriculum:11). The criteria for choosing themes and topics were their relevance for future society and their 'concreteness', meaning topics which children could easily relate to and engage with based on their own experience. In emphasising the importance of the

fit between education content and cultural and social context, the curriculum resembled the Porto Alegre democratic school model described in Chapter 2. Returning to Scott's classification, the 1980 Curriculum was, in contrast, more 'instrumentalist' in nature (Scott, 2008). The curriculum aimed explicitly to shape future citizens and develop their skills, values and competences to be active and responsible members of society. This meant that schools had to offer a

compulsory common course, which covers the same topics in all regions of the country; as society wants to guarantee a common reference and equal education to all citizens. (1980 Curriculum:14)

As well as emphasising an 'equal education', the 1980 Curriculum introduced for the first time the concept of 'equivalent education' (*likvärdig utbildning*). The concept of equivalence was introduced at a time when the previously dominant distributive interpretation of equality began to be problematised in public debate. It is important to mention here that the words *jämlike* (equality) and *jämlig* (equal) can also be interpreted in Swedish as 'same', or 'identical'. This may help to explain the initial introduction of the term equivalence, which was imbued with the same egalitarian principles as equality but which opened up the idea of teaching and learning differentiation.

According to the 1980 Curriculum, by offering an equivalent education schools could help create a common frame of reference for all, while at the same time respecting each student's individuality.

Children are different when they come to school, school should not seek to make them be the same. When they leave school they should do so while maintaining their individuality and uniqueness and with acquired ability to respect the individuality of other people. (1980 Curriculum:14)

The use of the concept of equivalence in 1980 Curriculum clarified what was already present in 1969 Curriculum in terms of respecting students' individual preferences with regard to school-work. The idea of equivalence was used to bring together two important concepts: the right to an education equal for all; and the right to an education that valued pupils' individual personalities and learning styles through an open pedagogical approach. In this respect, as mentioned earlier, the early conceptualisations of 'equivalence' had much in common with the idea of equality of capabilities explored in Chapter 2 (Sen, 2002). 'Equivalence', as deployed in the 1980 Curriculum, seemed to embody the enabling aspect of equality of capabilities.

Between the end of the 1970s and the beginning of the 1980s, equivalent education was mentioned with the same meaning in two government bills that addressed the working methods and organisation of schooling. These have been extensively analysed, along with later bills, by Thomas Englund (2005).

The Government Bill 1978/79:180 emphasised the importance of a common curriculum:

There must be a shared curriculum in all schools that includes common subjects and objectives. This will guarantee a common frame of reference. Children's education must not be left to local priorities and decisions that could result in the loss of equivalence between schools.
(page13)

At the same time, school had to create room for differentiation and respect for students' various approaches to learning; this is explicitly connected with developing self-confidence in young learners:

Schools should not be homogeneous in their organisation as this could lead to pupils losing their sense of worth.
(ibid.)

The Government Bill 1982/83:1 (also analysed by Englund, 2005) also emphasised the importance of compulsory school in providing a common frame of reference for all.

With compulsory education, all pupils have access to an equivalent education, regardless of place of residence and/or social context. An important requirement placed on all schools is that pupils shall receive the same basic knowledge and skills. The curriculum has a common core syllabus that includes the same subjects and objectives for all schools. In this way, all pupils are ensured a shared frame of reference. The education pupils receive at the compulsory school level must not be left to local decisions and priorities which could lead to a loss of equivalence.
(page14)

The two bills illustrate the growing focus on equivalence at the expense of equality. In the 124 pages of the 1978/79 bill, the term equality occurs 14 times and equivalence just 4 times, while in the 80 pages of the 1982/83 bill equality appears five times while equivalence is mentioned three times (Table 1). Despite the increasing prominence of the term equivalence, however, the idea of a school based on egalitarian values was not fundamentally challenged in these documents.

4.3.2 1989-1993: *equivalence as enhanced individuality*

As noted earlier, the 1980s were years of intense political debate in Sweden, focused on the decentralisation and restructuring of the public sector, which was criticised by the conservatives for being too large, expensive and inefficient (Schüllerqvist, 1995). In education, the Conservative Party expressed concerns about the high costs of schooling and poor results in international comparisons,

such as the PISA exams. The influential Lindbeck Commission Report (Official State Report 1993:16) questioned the benefits of small class size and progressive pedagogy in relation to pupil performance and results, once more reinforcing the idea of education's primary purpose as benefitting the national economy rather than forming future citizens. From a different perspective, the social democrats criticised the education system for promoting a formal curriculum that was based largely on the needs of a technocratic society and did little to reverse class-based inequalities. Parental choice and influence became a prominent issue in the education debate at this time. The Citizens' Public Inquiry 1991:14 (*Medborgarnas offentliga utredningar* 1991:14) affirmed a family's right to choice over their child's education, and rejected the 'state monopoly' over Swedish schooling. Karin Hadenius (1990) also challenged the concept of equality of education opportunity by suggesting an alternative interpretation of equality as the equal right to be treated differently, in line with different student needs and attitudes to learning.

This is the context in which a considerable step towards decentralisation was taken in 1989, making local municipalities the main employers of teachers. The government bill that introduced this change also introduced choice and competition in the education system, reinforcing a notion of education as part of the private sphere of the individual.

It will in the future be easier for free schools, alternative to the public education system, to gain acceptance and be supported financially [....]
The choice of schools by pupils and parents shall be satisfied as far as practically and economically possible.

(Government Bill 1988/89:4:52-56, cited in Englund 1994a)

In this 100 page document, equivalence was mentioned fifteen times, while equality appeared only twice (Table 1).

A strong focus on individualisation and choice was also present in the 1990 government report *The Study of Democracy and Power in Sweden* (Official State Report 1990:44), summarised by Lindblad and Wallin in 1993. In this report the public sector was positioned as a problem, rather than a solution to society's ills, whilst decentralisation and private initiative were regarded as the way forward. The language of the document mirrored the 'problem-solution' rhetorical pattern discussed in Chapter 3, creating through the use of intransitive and impersonal verbs a sense of objectivity and unavoidability in the positions expressed within it.

The era characterised by strong public sector expansion, centralised collective bargaining based on a historic compromise between labour and capital, social engineering and centrally planned standard solutions has come to an end. [...] The present period is characterised by individualisation and internationalisation. The fundamental problem of

democracy, i.e., how to reconstruct individual freedom, is now re-emerging in a partly new constellation.
(Official State Report 1990:44:190 – translation of Lindblad and Wallin, 1993, cited in Englund: 2005)

In *The Study of Democracy and Power in Sweden* (1990) democracy was conceptualised as ‘small-scale’ – as the condition in which citizens’ individual initiative and ambitions could be realised.

Berg (1992) argued that a form of ‘state societification’ is behind concepts such as deregulation, decentralisation and steering by objectives, which were important, intertextual themes in policy documents from the late 1980s to early 1990s. For Berg, decentralisation could be considered a strategy to implement ‘ambiguous state reform intentions’ (Berg, 1992:339). In line with this strategy, central government devolves responsibility to solve conflicts arising from new reforms and policies to peripheral actors. This idea was also considered in Chapter 2 in relation to other policy areas such as social housing and healthcare.

During these same few years, and reflecting ideas set out in Official State Report 1990:44, the Ministry of Education report, *Division of responsibility and management within schools* (Discussion Paper 1987:1, analysed by Englund, 2005), introduced a more individualistic, ‘small-scale’ interpretation of equivalence. The report, which considered issues such as the division of responsibility and the management of schools, informed the subsequent decentralising bill of 1989. Equivalence was mentioned in the 1987 document in relation to individualisation, but its meaning was somewhat different to that outlined in the Government Bills 1978/79:180 and 1982/83:1. No connection was made to a ‘common frame of reference for all’ or to enabling students to reach their potential regardless of their specific circumstances. Rather, in the discussion paper equivalence was understood purely to be about enhancing the individual interests of students, as can be read on page 34:

Pupils have diverse interests in and aptitudes for different aspects of their education. [...] Equivalent education shall not be one-size fits all and must be shaped by the interests of pupils in relation to both content and methods.

In this sense the term equivalence was repositioned from a pedagogical concept (denoting differentiation in instruction) to one emphasising individual rights to be treated differently. The report broke with the tradition of a uniform, common curriculum aimed at shaping future citizens through a learning process underpinned

by values of solidarity and mutual respect. Instead it shifted the focus to teaching as a means of promoting students' personal interests and aptitudes.

Two government bills built on the 1987 discussion paper and focused respectively on the administration and the responsibility for education (Government Bill 1988/89:4; Government Bill 1990/91:18). Both promoted an understanding of equivalence as *enhanced individualisation*. This perspective was further developed by the Long-Term School Planning Commission which culminated in the report *Education for the 21st century* (Official State Report 1990:14), stating on page 53 (cited in Englund, 2005) that:

The main purpose of education is to let pupils discover progressively their comparative skills and true interests, and to provide them with the opportunity to develop their unique creative potential to the greatest possible extent.

While the curricula at this time continued to focus on citizenship apprenticeship, official reports and government bills from the late 1980s and the very beginning of the 1990s began to outline a notion of education related to citizens' personal interests and to the enhancement of their personal potential. Concerns with equality, in both its distributional and relational conceptions, were increasingly marginalised. The Government Bill 1990/91:19 (concerned with responsibility for schools, also analysed and cited by Englund, 2005), nevertheless, warned on page 19 of the potential risks of losing the earlier focus on equality as a central element of equivalence:

Changes in school management must not result in a slip back into inequality, leaving good education to those who have the financial means or can best pursue their own benefits. Nor must it result in leaving decisions about the content of education to local institutions, which can result into equivalence being challenged.

This extract is particularly relevant for two reasons. First, the 'need for greater influence', here meaning parental influence, clearly related to the idea of 'small-scale' democracy in an education setting. Second, by considering these potential risks, the bill implicitly encouraged the development of strategies that would prevent a 'relapse into inequality' from taking place. From this point on, equivalence became linked to a process of monitoring and evaluation that, it was hoped, would guarantee its integrity (Englund, 2005). This was made explicit in the 1994 Curriculum.

4.3.3 1994-1996: *equivalence as attainment of national goals*

The National Curriculum *Lpo94* (*Läroplaner för det obligatoriska skolväsendet*) was published two years after the School Voucher Reform. In its opening chapters the term equivalence is used four times, while equality appears only once (Table 1).

The 1994 Curriculum was structured into two main sections, covering the 'fundamental values and tasks of the school' and 'goals and guidelines'. In each section, the document set out a list of objectives schools were expected to attain and guidelines as to how to achieve these. The importance of monitoring and evaluation, which had been foreshadowed in the Government Bill 1990/91:18, was made explicit and consolidated in the curriculum. For the first time in Swedish education the curriculum became part of an intertextual discourse of outcomes and result-based accountability that was also present in other policy areas (for example, the provision of Swedish language courses for immigrants, see Rosén and Bagga-Gupta, 2013, and housing policy, see Turner and Whitehead, 2002).

All topics were broken down into quantifiable units, and the task (*mål*, which can be translated into English as either task or aim) of schools was to achieve them in whatever way they saw fit (*på olika sätt*). Two sections were entirely new, compared to previous curricula: 'the individual school' and the 'responsibility of the school head'. A school was no longer considered to be an institution serving a social role by acting in a school-home-society *continuum* and based on a shared set of values. As part of the discourse of the small-scale democracy outlined in the first part of the chapter, collective state responsibility is not central in the document. In the 1994 Curriculum schools were positioned as individual entities, responsible for fulfilling goals and clearly informing students and their families about strategies and priorities. At the same time, management assumed an important role, being responsible for monitoring processes and following central guidelines.

In relation to the aims of school, 1994 Curriculum (page 3) stated that:

The task of the school is to encourage all pupils to discover their own uniqueness as individuals and thereby actively participate in social life by giving of their best in responsible freedom.

These aims are related to the idea of an equivalent education that 'cannot be the same for all' (1994 Curriculum:6), but which must take into consideration pupils' personal interests and ambitions as well as their specific needs. Whilst 1969 Curriculum and 1980 Curriculum had clearly stated that the aim of school was to build children's foundational abilities to act as citizens in a diverse society, there

was no explicit focus in these documents on future vocation. In contrast, 1994 Curriculum clearly specifies that one of the tasks of school is to enhance students' potential so that they will be better able to choose and achieve the academic or vocational path that best suits their interests and abilities. In emphasising this, it was clear that the purpose and focus of the curriculum had shifted from education for society (shaping citizens) to education for the benefit of the individual (preparing successful professionals).

In the 1994 Curriculum, in contrast to the 1980 Curriculum, equivalence was not mentioned in relation to teaching differentiation, the variety of students' needs, or enhancing students' self-confidence. Rather it was recontextualised from pedagogy to management and related to resource allocation and achieving goals, freedom of choice, and enhancing students' individuality. The personal growth of the child and the playful aspect of learning, so central to the 1969 Curriculum, were relegated to the background in the 1990s. In their place, the 1994 Curriculum presented a more performance-oriented vision of school-work, centred on the development of children's potential, in particular in relation to communicative skills and the future outcomes of education. In discursively marginalising equality in favour of efficiency and results, the 1994 Curriculum can clearly be seen as a Swedish contribution to the school improvement movement of the 1990s (Hatcher, 1999) discussed in Chapter 2.

The notion of equivalence at the heart of the 1994 Curriculum was echoed in the 1996 *Skolverket* report *Equivalence, a shared responsibility* (*Likvärdighet—ett delat ansvar*). In this document, equivalence was explained by reference to two principles that should guide the relationship between state and citizens: first each citizen must be equally respected and considered by the state; second, each citizen must be provided with essential resources to sustain his/her chosen way of life.

The emphasis on the state–individual relationship was clear. Individually chosen ways of life became central to the educational debate, rather than an idea of collective action or democracy.

The report advocated redistribution of resources so that all children could access education equally and be supported according to their needs. However, reflecting the 1994 Curriculum, equivalence was measured through the attainment of goals, and responsibility for resources was given to principals who were required to meet national objectives and were assessed on this basis. The monitoring of school

principals themselves was a responsibility of central government, exercised via school inspections.

Principals are responsible for what is clearly regulated in the Education Act. The Principal, who is the manager of a part of the public school system, is responsible for ensuring teaching is conducted in accordance with the provisions of this Act and the regulations that may exist in other legislation and policy. [...] Through the national monitoring system, evaluations of various types and supervision of school activities, schools take responsibility for providing data that shed light on an equivalent education. *(Equivalence a shared responsibility:34)*

External accountability became key in the assessment of school quality, reinforcing the 'knowledge-power' connection between quantifiable outcomes and 'good schooling'.

As in the 1994 Curriculum, an instrumental approach to schooling was promoted in the 1996 *Skolverket* report. Education provided opportunities for students to further academic or vocational development.

Equivalent value in education is linked to the role of education in preparing students for further studies, citizenship and working life. This involves transmitting educational content and cultural heritage - values, traditions, language and knowledge - from one generation to the next. It involves providing a foundation of knowledge, values and standards in preparation for employment. *(ibid.:35)*

Attention was also given to cultural heritage. This had already featured in the 1980 Curriculum, however in that document schools were considered lively and active centres in the cultural life of the country with a role in the interpretation, processing and questioning of values as part of a relational conception of equality aimed at challenging traditional roles. In contrast, the 1996 report offered an essentialist and uncritical approach to value transmission, to be achieved in the context of goal attainment and a focus on enhancing individual potential. A similarly uncritical interpretation of value transmission, including internationalisation, had been presented in the 1994 Curriculum. (See Chapter 5 for more details). Internationalism was now featured among the core values of the curriculum, to be transmitted to new generations. However it was not constructed in a clear-cut way, leading to different interpretations (Chapter 5, 6 and 7). Internationalisation could be interpreted in the instrumental sense of shaping internationally competitive students and fostering a clear sense of identity and belonging linked to a precise cultural tradition. It could also be interpreted as the ability to relate to and respect different cultures. This issue will be discussed in further detail in Chapter 5.

4.3.4 1996 – 2003: *equivalence as enhanced flexibility of school management*

Skolverket published in 1996 and 2003 two other reports on the post-reform school: *The Educational Scene 1996* and *School choice and its effects in Sweden* (the latter was published in English).

In *The Educational Scene 1996* the result oriented focus evident in previous documents was taken one step further. Education goals were now to reflect quantifiable results, rather than the content to be taught, again reflecting a discourse of quantifiable results and international, decontextualised comparisons (Segerholm, 2001 and 2009; Sedel, 2004). Decisions about what knowledge to teach, as well as how this knowledge should be conveyed, were deemed to be professional responsibilities. These responsibilities were to be exercised within a new devolved system of school management, in which schools were constructed as free to choose the best managerial model to ensure that objectives were attained.

Attainment of objectives was also central to the 2003 *Skolverket* report, *School choice and its effects in Sweden*. This document summarised the results of a research project on the consequences of the Voucher Reform in relation to family and student satisfaction, segregation and school performance. The section of the report entitled 'School choice from the point of view of equivalence' (page 23) is particularly significant for this analysis. The section addresses the political implications of having gradually replaced the term 'equality' with 'equivalence' in education policy documents:

As distinct from equality, the concept of equivalence finds it easier to incorporate other values such as freedom and diversity. Furthermore, the concept of equivalence allows room for the requirement for new organisational forms. [...] In comparison to equality, equivalence is a softer and more ambiguous term.

(*School choice and its effects in Sweden*:26)

While previously responsibility for education belonged to the state, this was replaced by 'a shared responsibility between politicians and civil servants as well as between national levels and the responsible local authorities' (ibid:4, cited in Englund, 2005). Equivalence had become a concept open to multiple interpretations. In this respect, equivalence can be linked to ideas of governance outlined in the first part of the chapter, involving devolved responsibility to citizens and intertextually present in different policy areas.

The 2003 report charted the evolution of the concept of equivalence from teaching and learning differentiation, to individuality and freedom of choice, to attainment of minimum requirements, to a concept that is sufficiently flexible to allow multiple interpretations to coexist in the context of a highly decentralised education system. The report recognised equivalence as an ambiguous and controversial concept that offered far more space for local interpretation than the concept of equality could ever allow.

4.3.5 1999 – 2012: *equivalence as re-regulation through quality assurance*

Following the publication of *The Education Scene 1996*, inspections and monitoring of goals became more and more connected to the notion of equivalence. Individual schools could choose the best way to achieve equivalence, but this had to be demonstrated through a regimented system of quality assurance.

In the documents analysed in previous sections of this chapter, the assessment of the strengths and weaknesses of individual institutions, and the way in which equivalence was enacted in each school, was considered a matter open to discussion. However, starting with the report *The Status of Compulsory School* (*Skolverket*, 1999b) there was a marked shift, with *Skolverket* positioned as the only legitimate source of correct evaluation in relation to goal achievement. Equivalence appeared in the 1999 report as a key criterion in the evaluative process of school practice. The ‘knowledge-power’ perspective already discussed in relation to the analysis of documents from the early 1990s when the discourse of external accountability first appeared, is reinforced here. In the 1999 report, in the name of quality assurance, external assessment of school-work was constructed as central to the education system.

Equivalence came to be seen as something ‘belonging’ to certain groups, while excluding others. Those working in schools were no longer expected to discuss and shape equivalence, they were supposed to implement it by ‘taking the appropriate actions on different levels’. ‘Increased supervision’ was therefore necessary in order to monitor and prevent potential problems. The responsibility of each school was reconstructed in terms of ensuring that equivalent goals could be attained. This focus intensified from 2005 on (see *Skolverket* report 2005c on *National Assessment and Grading in Swedish School System*), when *Skolverket* recommended more national exams, further clearly specified goals and descriptors

(in primary and lower-secondary school), additional monitoring of school performance and the implementation of a formalised system of summative assessment from primary school on (grade 7). The 2005 *Skolverket* document clearly constructs equivalence in terms of assessment. Specifically, fulfilling equivalence is equated with ensuring that students reach minimum school attainment standards.

As discussed, in the 2000s, constructions of equivalence shifted further in policy documents, although remaining in the semantic field of assessment. Equivalence became equated to the fulfilment of certain specific goals. Debates during these years reveal that the term equivalence featured centrally in discussions about the development of new criteria for student assessment. The independence of schools and teaching staff decreased, whilst the role of *Skolverket* became prominent as a regulative body in education (Segerholm, 2009). The proper focus of schools' attention was now very clearly to help pupils pass their tests.

The 1999 and 2005 reports paved the way for the 2010 Education Act, and the consequent reforms of teacher education and upper-secondary schools presented in the first part of this chapter. *The New Education Act - for knowledge, choice and security* (2009/10:65) was one of Sweden's most extensive education acts, covering all phases of the education system from pre-school to adult education. In its 1348 pages and 29 chapters, the word equality is mentioned just twice, whilst equivalence now appeared 161 times (see Table 1).

The 'management by objectives' approach was clearly outlined in the Act. Eleven of the 29 chapters focused on quality assurance measures, to be monitored by particular education bodies (*Skolinspektionen*, *Skolverket*), and on sanctions for schools not meeting given criteria. The Act set out minimum requirements that schools needed to meet to fulfil objectives set out in the national curriculum. These concerned attendance, teachers' qualifications, and teaching and learning equipment.

The Act once again emphasised a highly individualised approach to education, with individual abilities measured and linked to school goals:

All children and students shall be given the guidance and encouragement they need in their learning and personal development to enable their own potential to be developed as far as possible according to educational goals. (Government Bill 2009/10:65:29)

The idea of education as citizenship apprenticeship was by now almost entirely lost. The link between individual student development and school goals was strengthened by clarifying the responsibilities of managers and teachers in relation to centralised assessment:

If in the context of teaching or in preparation for a national test, according to information from teachers or other school staff, from a student or a student's guardian or from elsewhere, there is a risk that a student will not meet the requirements to pass a course, this shall be reported to the Principal. The Principal shall ensure that the student's SEN is promptly investigated. (Ibid.:29)

An analysis of the language used in this document reveals the 'problem-solution' pattern already outlined in previous sections of this chapter. In particular, the construction *ska* [shall] + infinitive was used extensively, suggesting that the decisions already made were the only effective and feasible options. As a quality assurance measure, 'senior teachers' (*lektorer*) were reintroduced in Swedish schools, their task being to monitor the quality of subject teaching across their school.

The Act continued the growing emphasis on parental involvement. However, the form this took was to be shaped by the specific framework established in each school:

Children, students and guardians shall be informed about how they can express their influence and ask for consultation. They shall also be informed about the main features of the rules that apply to education and their school. The Principal or nursery manager is responsible for ensuring that such information is provided. (Ibid.:34)

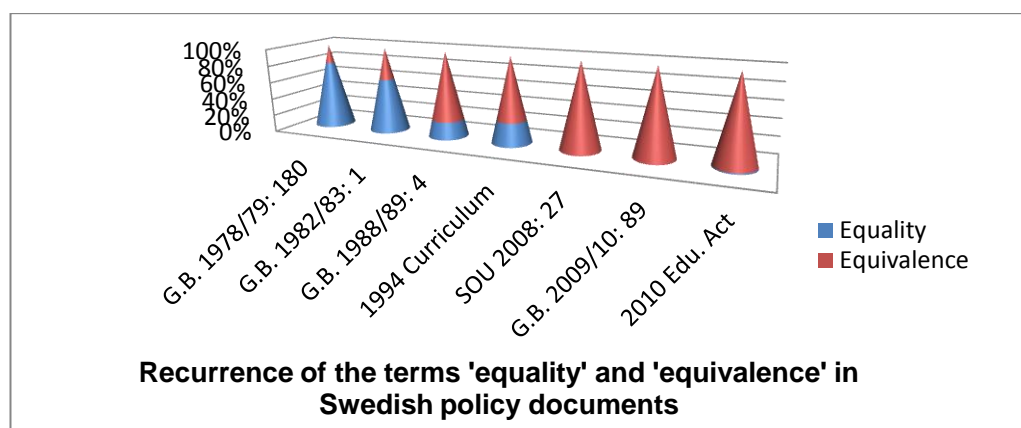
In stating that parental influence should be tailored to the rules and circumstances of individual schools, the Act reinforced the idea of partnership that had featured in the 1997 School Committee report.

The same constructions of equivalence, as attainment of goals within a system of quality assurance, appeared in the two bills on reform of teachers' education and upper-secondary schools. In *Path to the future*, the 2008 proposal for a reform of the upper-secondary school system (Official State Report 2008:27), the term equivalence featured centrally, appearing 82 times in 686 pages (Table 1). In *Top of the class*, the proposal for reforms to teacher education (2009/10:89), equivalence occurred 17 times in 80 pages (Table 1). In both documents, equivalence was conceptualised in terms of attainment of minimum goals set out in the national curriculum. In *Top of class*, considerable attention was given to the accountability

aspects of the profession, such as learning how to monitor students' progress and design effective assessment models. The focus on outcomes and an instrumental view of teaching and education were at the core of this document, promoting a discourse of international comparison and 'quality' (Bergh, 2011), which will be analysed in the following chapters.

This final set of documents revealed how equivalence was recast in terms of attainment of goals within a prescribed framework of inspections and national testing. They identified a 'knowledge-power' relationship between external assessors and monitoring bodies and schools, with these external parties constructed as the only legitimate judges of 'good schooling' as well as being responsible for setting the standards against which school is assessed. At the same time, however, they showed how schools and their management were granted freedom to choose the content of education and their preferred way to reach national goals. Chapters 6, 7, 8 and 9 will explore how this dual construction of equivalence, as both flexibility in managerial models and regimented quality control, creates tensions in policy enactment in the two case-study schools.

Table 1. Word count: equality/equivalence in key policy documents



4.4 Conclusions

This chapter has provided an overview of Swedish education policy, and explored how the term equivalence has been recontextualised in important policy documents over the 30 years between 1980 and 2011. Drawing on tools from CDA, the chapter has explored how the term equivalence was differently constructed in a number of documents (official reports, curricula, white papers) and intertextually connected to other policy areas. In addition, it highlighted a form of 'knowledge-power' relationship between external accountability, which has been constructed as the

ultimate evaluative measure for school-work, and the flexibility schools came to be offered in terms of managerial models.

From the 1960s to the late 1980s Swedish education policy was solidly based on the values of equality of opportunity, shared responsibility, tolerance and solidarity. The 1969 and 1980 curricula constructed education in terms of social right, and the main task of schooling as shaping children to be responsible and active members of future society. Resources were allocated in relation to the needs of different school populations. Both curricula explicitly linked good education to a comprehensive learning environment that closely reflected society beyond the classroom (1969 and 1980 curricula), in doing so drawing on distributional and relational notions of equality. The term equivalence (*likvärdighet*) was introduced in the 1980 Curriculum in relation to teaching differentiation and attempts to enable all students to contribute to the life of their communities. In this sense, this early interpretation of the term could be linked to constructions of equality of capabilities, presented in Chapter 2. The curriculum acted as a common frame of reference, providing a core set of values and themes to be addressed in all school work. Within this framework, teachers were encouraged to adopt varied pedagogical methodologies so they could support all students to develop their individuality, self-esteem and respect for others.

During the 1990s, the concept of equivalence began to be associated with a range of different ideas that challenged its original meaning. The notion of equivalence as a common educative framework, and the basis for collective democracy, disappeared from policy documents starting from the late 1980s. It was replaced by a concept of equivalence as enhanced individuality in the context of small-scale democracy, which was linked intertextually to a number of other policy documents in that period. In education policy, enhanced individualisation was linked to high levels of parental involvement and freedom of choice in relation to school options. School was also seen as an opportunity to develop a student's personal potential to pursue individual interests in life. With the 1994 Curriculum, came a focus on monitoring equivalence through the attainment of national goals, which were handed down to schools, school principals and teachers to achieve. Through these changes, equivalence revealed itself to be a highly flexible term, one that allowed for the possibility of negotiation between government and school management. Writing in 1992, Berg observed that: 'paralleling state activity in the field of decentralisation, there have been efforts to develop sophisticated control measures

[...]. Can this be taken to mean that there is a well-advanced trend towards steering of the school by *ex-ante* strategies?' (Berg, 1992:342). A review of more recent policy documents suggests Berg's focus on *ex-ante* strategies is appropriate; these documents are characterised by concerns about stricter regulation of who can access the teaching profession, and about the grading system. A school system based on radical decentralisation has led to the creation of many independent schools in which the majority of members of teaching staff do not hold any formal teaching qualification (Alexandersson, 2011). In this context, standardising assessment and enhancing accountability based on results are considered important ways of guaranteeing equivalent education.

These developments echo European and global trends towards greater levels of international comparability, based on standardised assessment (described in Chapter 2), and have been discussed in this chapter in relation to the rise of an instrumental approach to schooling. The next chapter will explore in depth the meaning of 'internationalisation' in Swedish education policy. It will do that by examining how the term has been constructed in education policy documents and interpreted by equivalent schools enjoying relatively extensive flexibility in terms of managerial model and internal organisation.

Chapter 5

Equivalence and internationalisation in six Stockholm schools

5.1 Introduction

Chapter 4 reviewed the development of Swedish education policy from the introduction of a comprehensive school system to the present. It analysed shifts in the meaning of the term equivalence from an emphasis on differentiated pedagogy and respect for student individuality, to a focus on the attainment of curriculum goals and enhanced flexibility of school management, and finally to a focus on monitoring and evaluation of school work via inspections and a stricter grading system. These developments were linked to international trends over the same time period, including the rise of the school improvement movement (see Chapter 2) and ‘the governance turn’ (Ball, 2009a), which promoted individual responsibility and self-regulation and constructed citizens as either partners in governance or consumers (Dahlstedt, 2009; Thörn, 2012; Johansson and Bergstedt, 2015).

These trends can also be seen clearly in relation to adult education in Sweden. Once constructed as a democratic institution and locus for social transformation, over the past three decades adult education ‘has been repositioned as an adaption to the market, in which the individual learner is regarded as a worker or customer rather than a citizen’ (Johansson and Bergstedt, 2015:51). While not explicitly attacking the democratic ideals at the heart of adult education, this change certainly ‘did not imply the dedication of special attention to developing and securing them’ (Johansson and Bergstedt, 2015:ibid.; Bergstedt and Helmstad, 2003).

In the school context, the steering by objectives strategy of the 1994 and 2011 curricula, and the need for continuous training and professional development of staff, can both be framed as self-regulating and self-evaluating (Rose, 1999; Dahlstedt, 2009) measures aimed at individual schools and teachers. As Ball comments: ‘All of these aspects of governance are now part of the transnational flow of policies and policy discourses. Policy can no longer be ‘thought’ or ‘thought about’ within the limits of the nation state and national boundaries’ (Ball, 2009a:537). In line with international trends, education is constructed as one product among others in a global market. This shift paves the way for new forms of international comparison, whereby learners’ key competences are compared across countries (Lundahl, 2002; see Sundberg and Wahlström, 2012) and standardised

international tests such as TIMSS (Trends in International Mathematics and Science Studies) and PISA (Carlgren, 2009, see Grek et al., 2009) become central to education (see Chapters 2 and 8 for further discussion).

Chapter 4 explored how OECD reports and PISA results influenced the debate over education in Sweden in the 1990s. It also analysed recent policy changes in upper-secondary education, including the introduction of the European model of grading and what Sundberg and Wahlström (2012) define as a 'denationalised curriculum'. Having outlined these developments, it is important to understand how Sweden is positioned in relation to international trends and how these specifically affect equivalent education and assessment at policy and school level.

Bourdieu (2003:91) suggests that the concept of globalisation plays a 'performative' function in the neo-liberal economy. Indeed, it could be argued that the 'national capital' (Bourdieu, *ibid.*) of each country is key to determining the extent of its autonomy and influence in the process of international policy making. Jayasuriya states that: 'The focus should not be on the content or degree of sovereignty that the state possesses but the form that it assumes in a global economy' (Jayasuriya, 2001:444). Building on this, Henry et al. (2001) suggest that the OECD influences and shapes the policy culture of 'marginal' nations, such as the Scandinavian countries, to a far greater extent than nations such as the US or the UK.

This chapter investigates the enactment of such international trends in Sweden through an exploration of international schools, which have recently gained prominence in the school market in Stockholm. Building on the policy analysis set out in the previous chapter, it will demonstrate how contemporary concepts of equivalence have created the conditions for very different school models to coexist and how these models relate to processes of internationalisation.

After introducing the Stockholm school market, this chapter will explore the concept of internationalisation in relation to education, how internationalisation is framed in the Swedish curriculum, and its relationship with equivalence. An analysis of the steering documents of the sample schools will then be presented.

5.2 The upper-secondary school market in Sweden and the Stockholm municipality

Data collected by *Skolverket* (2010, 2012, 2014 and 2015) show an increase in the number of independent schools since the 1992 reform. In 1991 there were approximately 60 non-public schools in Sweden. However, by 2013/14, their number had reached 1309.

The total number of students attending independent schools rose from 20,247 in 1995/6 to 490,000 in 2013/14 (this number includes students attending pre-school, primary and secondary schools). Fortyfour percent of these students are in upper-secondary education, and almost one third (27%) of all upper-secondary schools in the country are now independent. The number of municipalities hosting independent schools rose from 38 in 1995/6 to 189 in 2013/14. Independent schools are currently present in 64% of Swedish municipalities, with the highest concentration in urban areas. A third (33%) are located in Stockholm, Malmö and Göteborg (with 15% in Stockholm alone). By 2008, in the more affluent areas of Stockholm (the central and eastern parts of the City), about half of all upper-secondary students were attending independent schools (*Skolverket*, 2008; 2012).

Other trends recorded by *Skolinspektionen* (the Swedish Schools Inspectorate (2009 and 2012) include: growing numbers of applications for independent schools in areas previously populated by municipal schools; the establishment of a substantial number of new schools with a vocational (technical) orientation; and the reduction and closing of 'less successful' study programmes at both independent and municipal schools. *Skolverket* also points to an increasing rate of conversion of upper-secondary municipal schools into independent schools (*Skolverket*, 2008).

Seventy nine percent of independent schools are currently owned and run by commercial companies (Holm et al., 2011). Schools owned by commercial companies are often organised into chains or franchises, each characterised by a unifying pedagogical approach. Business commentators (*Affärsvärlden*, 2008) report that the three leading education companies in Sweden (Ultra Education, Fourfront, and *Drivkraft Värend*) were the fastest growing companies in the years 2005-6. These companies have improved their profitability still further by providing goods and services to other schools, including IT equipment, cleaning, meals and electricity.

Until the early 2000s Stockholm had only three international schools (just one of them fully private), which focused for the most part on serving the international population of the city (children of diplomats and ex-pat professionals based in Sweden for a limited amount of time). However, the number of international schools has increased steadily over the past 10 years. There are now more than ten international upper-secondary schools in the municipality of Stockholm.

As mentioned in Chapter 3, the reason why this study focuses on independent schools is because they have enjoyed considerable freedom in terms of their approach to the curriculum, pedagogy, staff recruitment and record keeping. Even though the 2010 Education Act brought both independent and municipal schools under the same regulatory regime, independent schools are still characterised by different pedagogical approaches and organisational cultures. Study of these schools therefore sheds light on different interpretations of equivalence (and internationalisation), demonstrating the potential flexibility of the term. A focus on international schools also enables an exploration of constructions of internationalisation, which gained prominence in the national curriculum from 1994, and provides an opportunity to explore how upper-secondary schools have adjusted to the pressure of international comparisons and competitiveness (Sedel, 2004; Segerholm, 2001 and 2009).

5.3 Internationalisation in education and in the Swedish curriculum

In this study international schools were selected because the concept of internationalisation has gained centrality in the Swedish curriculum (from 1994 on), in policy documents in relation to international comparisons (as will be analysed in Chapter 8) and in wider public debates. The concept has been linked, in particular, to discussions about quality assurance, 'school improvement' and the knowledge economy.

As Lingard et al. (2005) point out: 'at the global level, the influence of OECD education indicators, but particularly the TIMSS and the PISA studies and results, can be seen to constitute a new global space in education policy' (2005:774). In response, the school market in Sweden has become increasingly focused both on international comparisons and competitiveness and on preparing individuals to play their part in an increasingly multicultural society at home.

Analysis of Swedish education debates prior to the Voucher Reform reveals that several concepts and phrases were repeatedly emphasised in order to justify education reform, such as 'the age in which we live', 'our contemporary period', and/or 'the future' (Boman, 2002 and 2006). In these debates, education was positioned as an instrument that would contribute to the process of 'modernisation' in a globalised world and to the functioning of a multicultural society (Boman, 2002 and 2006). At the same time, education had to provide opportunities to the individual student to enhance their life chances in a competitive global market, and by doing so to also help boost the national economy (Seegerholm, 2009; Bergh, 2011).

Before analysing the individual profile of the six sample schools, it is important to develop a deeper understanding of the concept of internationalisation in education and see how this relates to the construction(s) of the concept set out in the Swedish curriculum and enacted by the sample schools.

5.3.1 Instrumental and transformative constructions of internationalisation

Although part of the literature on internationalisation of education refers to higher education (and much to medical education in particular) some of these studies are useful for this research as well, as they help frame the concept and offer insight into how it is interpreted in practice.

According to Hanson (2010), education internationalisation is frequently defined both as competition at institutional level to recruit students on a global scale (particularly in higher education), and as an educational process that prepares students to secure opportunities in a globalised market (Knight, 1999). For Warner (1992) in this 'market model' of education, internationalisation is about increasing instrumental advantage through an increased competitive status. Focus in this model is on standardisation and offering programmes attracting higher numbers of students, rather than innovation (Tjomsland, 2004).

An alternative interpretation of internationalisation is offered by a model of education focused on social transformation and critical multiculturalism, rather than the market (May, 1999; Kincheloe and Steinberg, 1997; Sewell and Majors, 2001). Gilroy (2004) refers to this model as 'planetary humanism' and Said (2004) as 'democratic humanism', by that meaning a reflexive critical humanism that is not Eurocentric and is non-sexist. Central to this model is a concern with helping learners to differentiate

between the values attached to different identities, and to encourage what Fraser calls 'a more differentiated politics of difference' (Fraser, 1997:204). This model of international and multicultural education recognises that globalisation can exacerbate inequality and the exclusion of some communities and individuals. It advocates a type of education that can enhance recognition of and transformative engagement with inequality and discrimination (Hanson, 2010). For Shi-Xu (2001:287; cited in Dervin and Hahl, 2015), the 'intercultural' never takes place in a 'power vacuum. [...] Intercultural communication is situated in [a] context of imbalance in power and inequality' that is often ignored in research and professional practice. Although the literature does not specify the modifications to curricula that are required to support social transformations, three points are often mentioned: inter-disciplinarity; reflexivity and engaged learning. Bond and Scott (1999), for example, suggest that an internationalised curriculum should question traditional forms of knowledge by

infusing an international dimension throughout the curriculum, using interdisciplinary approaches, emphasizing experiential and active learning, integrating and coordinating with other international activities and encouraging self-reflection on [local] culture and the way it influences cognition. (Bond and Scott, 1999:55)

This kind of internationalised curriculum challenges 'intellectual tourism', by that meaning the trend of applying traditional (for which read Western), academic knowledge to new contexts and cultures without engaging in serious self-reflection. According to this construction of the internationalised curriculum, an international education goes beyond providing opportunities for student exchange; it involves critical engagement with and reflection on identity formation, hierarchies of knowledge, political inequality and the politics of redistribution. Recognition of this is important in understanding how internationalisation is constructed in the Swedish curriculum.

5.3.2 Internationalisation in the Swedish curriculum as transmission of values

The Swedish curriculum does not define itself as international in terms of outlining a particular pedagogical or interdisciplinary approach, as recommended by Bond and Scott (1999) and Hanson (2010). The strict division between academic and vocational programmes and the focus on more traditional subject division reinstated in the 2011 Curriculum and the new teacher training curriculum seems to reinforce a less problematised approach to value transmission and hierarchies of knowledge. In this respect the Swedish curriculum seems to differ from the curricula in other

Scandinavian countries that are also attempting to deal with internationalisation through education. Current trends in Finnish education are, for example, emphasising inclusion within a multicultural society. Sirula (2006) points out that differentiation between academically and vocationally oriented senior-secondary schools has been reduced in Finland by integrating their curricula so that students can postpone choices about post-secondary school destinations and enhance their mobility nationally and internationally. Teacher training has also been recently reformed in Finland to take multiculturalism into account on the grounds that '[s]tudent teachers need to develop appropriate methods and tools for recognition, analysis and action, which can help them to work on and with everyone's diversity in the classroom and beyond' (Dervin and Keihäs, 2013 cited in Dervin and Halh, 2015:98). In contrast, as discussed in Chapter 4, the Swedish reform of teacher education moved in the direction of enhancing academic expertise at the expense of other aspects of education.

The growing strength of the discourse of international competitiveness has helped ensure the growth of the international schools sector in Stockholm. As signalled above, in addition to preparing students for their place in a globalised economy, the education system has been handed another responsibility - to equip young people to live in a multicultural society. As Boman (2006:545) points out, these twin responsibilities create some tensions:

Reduced to the dichotomy of neo-liberal vs. neo-conservative, recent reform proposals have called for more individual and parental choice *and* sought to justify, culturally and morally, a public education designed to bind diverse groups [...]. This tension between cultivating a common good and serving individual interests is deeply embedded in the institution of public education.

The problem of dealing with a multicultural society has been central to political debate in Sweden since the early 1990s. From this time, policies of linguistic integration began to construct multiculturalism in problematic terms in the curriculum for Swedish as a foreign language (Rosén and Bagga-Gupta, 2013).

Increasing internationalisation impacts in different ways on the lives of individuals and society. Recent immigration has brought new social and cultural challenges to Swedish society. [...] This increases the need for education to provide a cultural basis for the identity formation for each individual.

(Official State Report 1990:14, supplement 22:11, analysed in Boman, 2006)

In the government report quoted above, the societal conflict between Sweden's past and its future is a problem that must be resolved (Biesta, 2000, 2003, see Boman,

2006). Thus, the role of education is not only to help compete in a global knowledge economy, but also to address a pressing 'contemporary problem', namely the new 'social and cultural experiences' engendered by immigration.

In response to this, the 1994 and 2011 curricula present an essentialist interpretation of the idea of internationalisation, which focuses on the transmission of a supposedly fixed Swedish cultural heritage to new generations.

A deep knowledge of Swedish culture and history as well as the Swedish language shall be strengthened through education in many school subjects. A secure identity and consciousness of one's own cultural heritage strengthens the ability to understand and empathise with others and their value systems through internationalisation.

(1994 Curriculum:4)

The changes brought about by globalisation and multiculturalism increased the importance of anchoring individuals to 'our cultural heritage' in order to foster cooperation, respect and mutual understanding (Boman, 2006). The new curricula emphasise a loss of cultural identity and belonging, and pave the way for 'cultural heritage' and 'founding values' to become central discursive values in Swedish education debates (Boman, 2006). This approach has led to a focus on values transmission, as outlined in Chapter 4, and signals a shift from previous curricula (1969 and 1980), which positioned school as a site for lively debate, challenge, negotiation and construction of cultural values.

The approach to transmitting and reinforcing national cultural values through the curriculum has been explored in a number of recent studies which emphasise, in particular, the inadequate attention given to power relationships and social critique (Farmer, 2005; Inhorn and Janes, 2007). As noted by Teicher and Janson (2007), these studies highlight concerns about anchoring students to a specific cultural heritage, arguing that this approach to values transmission can perpetuate attitudes of cultural superiority (Duffy, 2001; Smith-Paríolá and Gòkè- Paríolá, 2006), accentuate and essentialise cultural differences (Grusky, 2000; Morris, 2005; Gustafson, 2005), and hence support neo-colonialism (Hall, 2006; Bleakley et al., 2008).

Building on this, recent studies of teaching English as a second language in Swedish schools suggest that this approach to cultural transmission does not always open up the 'ability to live together and appreciate the values that are to be found in cultural diversity' (1994 Curriculum). Lahdenperä (1999), and later Von

Brömssen (2006), Lorentz (2007) and Tholin (2014), show how Swedish education is to a large extent centred on the transmission of cultural norms that can actually prevent students from different backgrounds from participating fully. Such cultural norms are normalised as the starting point for reflections and act as a monocultural framework for school-work. Tornberg (2000, cited in Tholin, 2014) adds that 'Swedishness' appears to be a common point of departure for any form of intercultural comparison and that the study of Swedish as a language is rooted in the idea of a uniform national culture that denies the variety and differentiation of contemporary society. As Tholin (2014) points out, review of the international and Swedish research literature on modern foreign language teaching for students from immigrant backgrounds (Celce-Murcia, 2001; Jarvis and Pavlenko, 2008; Lahdenperä, 1999; Lundhal, 2009; Odlin, 1989; Rivers, 1978; Swan and Smith, 2001) identifies several particular 'trouble spots'. These include study of pronunciation or translation where a contrastive study of the language is considered the most valid, if not the only, pedagogical approach. This implies that students who do not master Swedish as their mother tongue are inevitably and considerably disadvantaged in their learning process (Tholin, 2014).

These examples are important. In the 1994 Curriculum for upper-secondary education expressions such as 'Western humanism' and the 'Christian tradition' were used to denote the core values of contemporary Sweden (1994 Curriculum; see Boman, 2006). The cultivation of tolerance, openness, and responsibility for future generations was associated with and regarded as historically anchored to these specific cultural traditions. In the education policy documents of the 1990s, the issue of internationalisation was related to the need to maintain a uniform and specific culture, in challenging times. According to this perspective, individuals must be embedded in one cultural heritage, by that meaning Swedish, as this would help them develop a clear identity and, as a consequence, appreciate others identified as 'out-siders'. A semantic analysis of these documents shows how students from mixed backgrounds, or first and second generation immigrant families, are often constructed as 'non-Swedish' and 'foreign' (*utländsk*). (The use of negative prefixes and highly connoted vocabulary is common). As noted by Englund (1994a, 1994b and 2010) this concern with the reproduction of cultural values seems to be at odds with one of the main pillars of the Voucher Reform: the fact that ethnic and religious minorities were free to found their own schools to preserve their values and traditions within the context of Swedish society. This example suggests an inherent contradiction in policies of equivalence (first introduced in Chapter 4), with

constructions of equivalent education seeming to pull in two opposite directions. On the one hand, equivalence enhances choice and flexibility in pedagogical and managerial models and allows private providers to start schools based on different epistemological approaches as well as faiths. On the other hand, recent conceptualisations of equivalence focus on prescriptive quality assurance mechanisms centrally administrated by *Skolverket* and *Skolinspektionen*. The tension created by these two coexisting constructions of equivalence will be highlighted in the following three chapters in relation to the case-study schools.

5.3.3 Internationalisation in the Swedish curriculum as enhancing mutual understanding

According to Lilley et al. (2015), one point needing consideration in relation to the growing emphasis on internationalisation in the curriculum is the definition of what a global citizen/student should be. 'Often education institutions neglect to explain how they interpret what a global citizen means [when they relate to internationalisation] particularly in terms of agency and responsibility' (Lilley et al., 2015:226). Global citizenship has been defined variously by scholars as: a sense of social responsibility and engagement (Schattle, 2008; Morais and Ogden, 2011); an attitude characterised by social and professional dimensions of empathy (Barrie, 2004); identity awareness (Killick, 2012:13); a collectivist outlook (Rhoads and Szelényi, 2011) and commitment to environmental approaches and values (Tarrant, 2010). UNESCO (the United Nations Educational, Scientific, and Cultural Organization, 2009) has also articulated its view on the 'ideal global student', stating that critical and ethical thinking are core aspects of education.

Such constructions of global citizenship mirror the aims of the 1969 and 1980 curricula in terms of shaping responsible and active citizens through social engagement and the negotiation and challenge of dominant values. However, they seem to be at odds with the main interpretation of internationalisation presented in the 1994 and 2011 curricula, which, as discussed above, focuses on reproducing one specific cultural identity rather than engaging students in critical reflection on hierarchies of knowledge, or critical multiculturalism.

This 'essentialist' interpretation of internationalisation is, however, not the only one presented in the Swedish curriculum. Looking again at the 1994 and 2011 curricula, the role of education was at some point also conceptualised in terms of shaping a

future citizenship able to reflect on and to some extent rise above their own particular obligations, beliefs, needs, and aspirations, with the purpose of becoming citizens engaged in a new Foucauldian (1979) 'governmentality' (Boman, 2006):

The internationalisation of Swedish society and increasing cross-border mobility place great demands on people's ability to live together and appreciate the values that are to be found in cultural diversity. The school is a social and cultural meeting place with both the opportunity and the obligation to strengthen this ability among all who work there.
(1994 Curriculum: 3-4)

Such an interpretation suggests that an international and multicultural education should go beyond enriching the content of the curriculum with examples from different cultures and value systems, to include critical reflection on differences and similarities and an examination of what these terms mean. From this perspective, education institutions can provide the connection between universalistic principles and practical relations in a particular community, helping students to reflect with, recognise and value other people.

Discussing the influence of neoliberal policies on education, Freire and Shor (1987) and Pring (1986) argue that a 'neutral education', by that meaning an education that aims to be 'value-free', may not equip students to tackle the richness and complexity of global society. The authors emphasise how students must develop tools of self-analysis and intellectual criticism in order to relate to and engage with difference. Rizvi and Lingard (2010) argue that a commitment to social and ethical questions and concerns is still central to international trends in education. For Green (2012), cultivating a 'moral compass' through education is pivotal in order to prepare students for global citizenship. The second interpretation of internationalism proposed by the Swedish curriculum seems to reflect this position well, with its focus on helping students to recognise, and engage critically with a culturally diverse environment.

The discussion above suggests that in the Swedish curriculum internationalisation can be interpreted both as a call to strengthen national and cultural identity as a precondition for understanding and respecting value systems identified as 'foreign', and a call to open up to and process the values of a multi-cultural and post-national society by enhancing students' 'moral compass'. My starting point is therefore that internationalisation can be integrated into school routines and practices in very different ways, within the framework of equivalent education, and can lead to very different education outcomes.

Chapters 1, 2 and 4 outlined the importance of international trends in the development of education policy in Sweden, focusing on the school improvement movement and international assessment programmes such as the PISA. These chapters emphasised how such trends affected debate in the years prior to the introduction of the Voucher Reform. The 1994 Curriculum, which introduced for the first time the term 'internationalisation' among its core values, revealed a strong intertextual link with these developments; however it did not present a clear-cut construction of internationalisation. As recognised by the 2003 *Skolverket* report, and outlined in Chapter 4 above, equivalence is a flexible term that is open to ambiguous interpretations. It is important, therefore, to investigate how schools that identify themselves as international construct and enact equivalence within an international framework, and which interpretation of internationalisation they choose to implement in their school practices. International independent schools in Sweden have not been the focus of many other studies (see Chapter 1), and their exploration offers a new dimension to research on how policies of equivalence are implemented in Swedish education.

5.4 The six sample schools

The steering documents of six international upper-secondary schools in the Stockholm area will be analysed in this section. In doing so, both common and distinct approaches to the enactment of equivalent education will be identified.

Municipal schools and, since 2010, independent schools are required to update their steering documents (*verksamhetsplanor*) annually and submit them to *Skolverket*, which uses the documents to monitor school achievements and future goals. The data presented in these documents are published on SIRIS, the national database for monitoring school quality and achievement. The steering documents set out: the school's vision; a refreshed outline of the school's organisation and goals; the results achieved (against both national and locally set goals); and any new goals for the following year. Prior to the 2010 Education Act, independent schools were not required to produce *verksamhetsplanor* (Holm et al., 2011), but most did so as they use the documents for internal management purposes, for inspections and for marketing. The documents are public and can often be found on schools' websites.

The schools I selected for my preliminary analysis are six upper-secondary schools located in central areas of Stockholm. As mentioned in Chapter 1, this municipality has been chosen as it is the area with the highest concentration of independent schools in the country. The schools include one municipal and five independent schools. All market themselves as international schools, or as having an international ethos, and offer similar academic programmes (some of them also offer vocational programmes). The city of Stockholm currently has 12 international schools, as mentioned at the beginning of this chapter. The six selected schools are, however, the most comparable as they are all located in the same area of the city (central or south Stockholm), offer the same academic programmes, and can be assumed to attract similar student populations.

The six schools are anonymised in my study and are identified using a pseudonym. A brief introduction to each school can be found below and their characteristics are summarised in Table 2:

- **City of Stockholm School (COSS)** is a municipal school located in a very central area of Stockholm. The only municipal school in the sample, COSS offers both academic and vocational programmes in Swedish and English, as well as the IB diploma programme. The school has about 1200 students and the number of applications from municipalities other than Stockholm City [*Stockholm Stad*] has doubled in the past two years.
- **Parkview** belongs to the first generation of Swedish independent schools. It was founded in 1994 by a not-for-profit education foundation involved in pedagogical research and international cooperation projects, including the development of schools in Africa. **Parkview** is located in one of the most affluent areas of central Stockholm. The foundation runs one primary and one secondary school and three upper-secondary schools. **Parkview** offers academic programmes only and has 430 students.
- **Global Education Academy** and **Southbank Academy** belong to the most successful enterprises running for-profit schools in Sweden. The two companies own more than 50 schools each, including primary, secondary and upper-secondary schools. Both companies were founded in 2003 and are aiming to expand further in Scandinavia and internationally. **Global Education Academy** (450 students) is located in central Stockholm, whilst

Southbank Academy (250 students) is located just outside the city centre, in a recently regenerated area of south Stockholm. Both schools offer academic and vocational programmes. As part of a chain, each school follows exactly the same schedule and approach to pedagogy and has access to the same teaching resources as other schools in their chain.

- **Saint George's**, along with **Stoneville**, is the newest school in the group. Located in south Stockholm it has 157 students. Although owned by another for-profit school enterprise, it is managed by a not-for-profit organisation and aims to support homeless and neglected children in the city. The school offers both academic and vocational programmes.
- **Stoneville** (700 students) is part of a very successful and fast-growing organisation running two secondary and one upper-secondary schools in central Stockholm (and a total of 19 schools across the country). The organisation is owned by a US investment company. **Stoneville** offers two academic programmes and the IB diploma programme.

Name of school	Type of organization	School population (2013/14)	Programmes offered	Management and organisation	Pedagogy
City of Stockholm school	Municipal school.	More than 1000 students.	Academic programmes: social sciences; natural sciences and IB diploma programme. Vocational programmes: music programme; individualised programme.	Shared management – staff grouped in teams working on different aspects of school organisation.	Common pedagogical approach across staff and departments.
Parkview	Independent school, part of a chain of 5 schools (3 upper-secondary) all based in Stockholm.	Around 430.	Academic programmes: aesthetics and social sciences. Natural sciences is offered in combination with another school belonging to the same chain.	Management team: one principal and three deputy-principals. Teachers are encouraged to take responsibility for certain aspects of the organisation.	Common pedagogical approach across staff and departments.

St. George's School	Independent school, part of a chain of more than 10 schools operating throughout the country.	Around 150.	Academic programmes: social sciences and natural sciences. Vocational programme: media and communication	An external board manages the school.	Teachers have a strong pastoral as well as academic role.
Global Education Academy	Independent school, part of a chain of more than 50 schools throughout the country.	Around 450.	Academic programmes: social sciences and natural sciences. Vocational programme: IT	The school is managed as part of a chain. There is a centralised board for all schools of the same type.	Teachers have a specific role as academic mentors.
Southbank Academy	Independent school, part of a chain of more than 70 schools throughout the country.	Around 250.	Academic programmes: social sciences and natural sciences. Vocational programme: IT.	The school is managed as part of a chain. There is a centralised board for all schools of the same type.	Teachers have a specific role as academic mentors. Classes and courses are centrally planned and distributed to the chain schools via an intranet portal.
Stoneville	Independent school, part of a chain of more than 19 schools throughout the country (3, including primary and lower-secondary in Stockholm).	Around 700.	Academic programmes: social sciences, natural sciences and IB programme.	The school has one principal and two deputy-principals (one resigned during the course of this research and his position had not been filled yet when the research was completed). Teachers are involved in academic management as heads of year/department and house.	Academically focused.

Table 2. The six sample schools

5.5 School *continuum* and presentation of themes

The flexibility allowed by the notion of 'equivalent education' (*Skolverket*, 2003), and the different interpretations of founding values and goals, are evident in the analysis of the six *verksamhetsplanor* (yearly school reports). A review of these documents suggests the schools can be positioned on a *continuum*, stretching from those that embody the values and goals of the pre-90s curricula (COSS and Parkview), to those that have enacted initial interpretations of 'equivalence' as respect for students' individuality (St. George's and the Global Education Academy) to schools with a more radically results-oriented ethos (Stoneville and Southbank Academy).

The positioning of these schools in relation to the concept of internationalisation mirrors this pattern. The documents do not include a specific section related to each school's approach to an international education; rather most focus on explaining that the curriculum is delivered in English instead of Swedish. However, the documents suggest that the schools approach internationalisation either in terms of shaping global citizens or preparing individual students for life in a globalised labour market. Positioning is not always clear-cut, as individual school practices overlap and embody different interpretations of equivalence and internationalisation.

In the section below, common themes identified in the documents are presented and linked to the values and aims of the national curriculum and to other policy documents analysed in Chapter 4. This analysis reveals the variety of ways in which 'equivalence' can be enacted in different school practices and the scope for variation that equivalence entails.

5.5.1 Citizenship apprenticeship

The relationship between school, curriculum and society is interpreted in different ways by the six schools. The different interpretations range from school as a place to train (global) citizens-to-be, to school as a place to enhance individual capabilities and career opportunities.

Among the schools, COSS is the one that makes the strongest and most explicit connection between education and the creation of responsible and participative citizens. The main purpose of this school is 'to shape students ready to take responsibility for and influence the future development of society in a sustainable global perspective' (COSS, *Verksamhetsplan*:2). By stating this, the school highlights a strong connection with the national curriculum and the achievement of the 'curriculum goals of internationalisation, sustainable development, democracy and human rights' (COSS, *Verksamhetsplan*:2). COSS' mission statement also mirrors some of the founding assumptions of pre-1990s curricula. In particular, it reflects the idea that a comprehensive school offers a privileged environment in which students can learn how to interact in society. It also reflects the importance of a cross-curricular pedagogy embracing different perspectives (scientific, cultural, historical, environmental, social) and different areas of expertise. In this respect COSS mirrors the interdisciplinary approach of an international curriculum. The report also emphasises the importance of having an international teaching and

student body, as this reflects the globalised world: 'The school is characterized by tolerance and diversity' (COSS, *Verksamhetsplan*:3). The COSS' document presents a coherent model of a school, in which organisation, routine and teaching content embody a vision of education as a social right. The *verksamhetsplan* emphasises how sharing responsibility between students and staff creates a positive learning environment that helps prepare students for post-school life. The expression 'shared responsibility' (*delat ansvar*) features in the opening statement and throughout most of the other sections of the report.

Parkview's report also conveys a vision of education concerned with enhancing students' active participation in school, as a microcosm of society as a whole. The mission statement emphasises the importance of developing learners' historical perspective and their social awareness in order to help them be part of society and 'challenge it politically' (Parkview, *Verksamhetsplan*:1). As is the case with COSS, Parkview's report highlights some of the curriculum goals in its own mission statement, including a procedural interpretation of internationalisation, tolerance and cooperation. Parkview's vision is centred on a holistic approach to learning and a student-centred pedagogy. An innovative and creative pedagogical approach is mentioned repeatedly as the foundation for every school initiative as well as for school organisation. Role-play, in particular, is presented as a key learning method designed to help students engage in critical decision-making processes, and develop their skills to take part in social action. The document also reports that at Parkview, students are responsible for running a number of services, such as the IT helpdesk and student clubs, and they are fully in charge of school theatre and music performances. They are also expected to engage in voluntary work both in Stockholm and internationally (for example, exchange projects with schools in Russia, China and Tanzania).

Although COSS and Parkview share a similar vision in terms of school values, approach to internationalisation, goals and organisation, it is important to underline a relevant difference between them. Whilst COSS is focused on the idea of education as citizen apprenticeship, Parkview is focused on the idea of education as holistic development of students through innovative pedagogy. For Parkview, the impact of education on society is a consequence of the all-rounded development of students, but it is not the starting point.

Parkview also offers a rich programme of interaction and collaboration with external institutions, including overseas schools and one of the most well-known Swedish art foundations. This programme is designed to help students develop personally and academically beyond the confines of individual subjects by giving them responsibility for complex projects. An innovative and student-centred pedagogy appears to be a strong marketing message for the school, although it is not explicitly badged as such. Participatory citizenship is a likely outcome of a holistic education but it is not explicitly defined as the school's primary goal, as in the case of COSS.

Unlike COSS and Parkview, the four remaining schools all emphasise the importance of education as a way of expanding students' individual potential and life opportunities in terms of further studies and careers.

St. George's is the newest school in the sample, and its report is far less detailed than those of the other schools. However, the school's mission is defined as helping students develop different perspectives on world issues and building their self-confidence, independence and autonomy (*självförtroende, självständighet och oberoende*). Self-confidence and autonomy are recurrent concepts in St. George's report and are related to the founding principles of the charity that runs the school. As highlighted in Chapter 4, self-confidence and respect for students' individuality were central concepts in the debate that led to the introduction of the term *equivalence* in policy documents in the 1980s. By including these terms, St. George's report seems to embody the original meaning given to equivalence in 1980s education policy documents. In both St. George's *verksamhetsplan* and in early 1980s policy documents education is positioned primarily as a personal investment, but one that is still strongly connected to the development of positive social values, such as respect and tolerance.

Stoneville's report introduces the term 'democracy' in the opening section of its mission statement, but doesn't refer to this term in any other section of the document, or problematise or contextualise the term. According to the report, students at Stoneville will learn how to participate in and influence democracy and how to express their opinions in a democratic context. At the same time, the school defines good students as achievers; extensive space is dedicated to the importance of high grades in order to support entry to British and US universities. Competition, focus, accountability and solid preparation are all key terms in the document. There are no references to connections between education and society or education as (international) social apprenticeship; the focus is on education as a passport to

further study or careers in a globalised world where English is the dominant language.

According to the reports from Southbank Academy and the Global Education Academy, the main purpose of school is to provide a sound education, judged in terms of high grades, and greater life opportunities and a better future for students. The focus is on the individual value of education, in terms of professional or academic investment. No particular reference is made to the international nature of the school.

One prominent characteristic of the reports of these last three schools, and Southbank Academy in particular, is the fact that students are always mentioned in the singular form: 'the student' (*e/ven*). The three reports hardly mention the student population as a community; they focus instead on learners as individuals to be considered individually in relation to academic progress and potential behavioural problems. Global Education Academy, in particular, dedicates extensive space to discipline issues. Whilst COSS and Parkview establish a direct link between the aim of social apprenticeship and specific pedagogical choices, this is missing from the reports from Global Education Academy, Southbank Academy and Stoneville, which emphasise a much more individualised approach to teaching and learning. This point will be considered further in the 'pedagogy and assessment' section, below.

5.5.2 School leadership and organisation.

The different approaches to citizenship apprenticeship discussed above are echoed in the way school leadership is presented in the school reports.

COSS' staff body is divided into six teams, each including teachers, managers, pastoral staff and student representatives. COSS 'wants to be a learning organisation where everybody learns from each other' (COSS, *Verksamhetsplan*:7). Each team works on a particular topic, either pedagogical (e.g. strategies to prevent failure in maths, how to adjust and incorporate curriculum changes), or organisational (e.g. scheduling and balancing students' workload throughout the year, organising trips for international projects). All teams are encouraged to 'work with equality' (COSS, *Verksamhetsplan*:5); 'equality' (*jämlikhet*) is also a required topic for discussion in pastoral groups across all year groups.

Teams at COSS are invited to approach their tasks and discussion topics holistically, with a sense of understanding and a sense of reality (*'helhetssyn, med en känsla av förståelse och en känsla av verklighet'*). The emphasis on reality links back to the 1969 Curriculum, in which topics for teaching were selected based on their concreteness and importance in pupils' life. The school principal takes part in meetings and carries out a programme of class observations. Peer observations between teachers are also an integral part of COSS' routine.

Analysis of Parkview's report suggests the school is not based on the same kind of shared leadership model as COSS. However with its focus on pedagogical innovation, Parkview does seem to allow time and flexibility for teachers to work together in research groups. These groups are more traditionally constituted, as subject-specific groups or as cross-curricular project teams. Each group has a leader, who reports to the principal and the Parkview Board. Parkview's *verksamhetsplan* doesn't offer many insights into how the decision-making process works, for example, in relation to changes to assessment policy or partnerships with other schools and institutions. Rather, it focuses on the importance of a committed and motivated teaching body with a high level of expertise. Teacher exchanges are favoured and the report highlights that the school has established an exchange programme with partner schools in Europe.

Compared to the first two schools, St. George's report suggests that it has a much more hierarchical leadership. According to the document, 'in order to guarantee the smooth functioning of the school the school board must apply the norms stated in national policy documents' (St. George's, *Verksamhetsplan*:1). St. George's *verksamhetsplan* explains how the school is governed by its board and how decisions are made within the organisation. The document outlines a clear hierarchy in which the school principal is in most circumstances not allowed to make decisions without these being previously approved by the board, and in which teachers seem to have limited voice. The document even stipulates norms governing communication between teachers and management (e.g. five days notice must be given to teaching staff when major decisions are put in place). The document doesn't mention subject or pastoral teams, although the individual pastoral role of teachers is clearly highly valued.

Stoneville also outlines a strict hierarchical structure in its *verksamhetsplan*. The school is divided into departments, and each of them has a head. Heads of

department are responsible for organising the teaching of their subjects and for making decisions concerning curriculum, pedagogy and internal subject assessment. Teachers work in subject groups, and no mention is made in the report of opportunities for mixed teams working across subjects. Heads of department report to the school principal. The school management team, which is responsible for decisions about school budget and provision, also includes a head of communication and marketing and a head of curriculum.

At Southbank Academy, middle management is considered 'essential to ensure a good running of school activities' (*'ledningen är viktig att säkerställa en god drift av skolverksamhet'*, page 8). This is linked to the strategy of the organisation that runs the academy, which is focused on acquisition of schools. New schools in the chain are expected to be operating within the corporate framework within one academic year of being taken over. Middle-management plays a crucial role in ensuring that school practices adjust to central guidelines. As well as deputy-principals and heads of departments, middle-management includes 'expert teachers' (*kunniga lärare*). Expert teachers are defined as those in charge of designing and updating course materials for the school on-line platform. The platform is available to all schools in the chain and teachers are required to use it. The on-line platform is central to the organisation's pedagogical model and results in a considerable reduction of course planning time in teachers' workload. It also results in contact hours with students being significantly stretched in staff contracts.

Global Education Academy's report also highlights the importance of an efficient management team in order to create a functioning work environment (the corporate language of efficiency is a feature of reports from all of the last four schools). In addition, Global Education Academy's report highlights the importance of a parent council, whose representative joins the school management team for important meetings. Global Education Academy is the only school that makes explicit reference to parental influence; throughout its report frequent mention is made of parents' satisfaction as a measure for evaluating the school's success. In Global Education Academy's report, the school refers to itself as 'the business' (*verksamheten*). The management team comprises the principal, the deputy-principal, the marketing executive team, and representatives from the parent council and teaching staff. Teachers are divided into three teams, according to the student age cohorts they teach. Teaching teams focus primarily on pastoral issues and strategies to increase respectful behaviour in school. The deputy-principal has full

authority to address the issue of poor attendance, whilst class teachers do not appear to be directly involved in the issue at all. According to the *verksamhetsplan* the deputy-principal is responsible for drafting and monitoring action plans for students with the lowest attendance rates.

5.5.3 Role of teachers

The importance of a committed teaching body is recognised by all schools. In its *verksamhetsplan*, COSS expresses gratitude for the commitment, professionalism and hard work of the teaching staff, whose efforts ensure extra-curricular activities can be planned and levels of student stress can be kept under control. Teachers are considered as a group and extensive attention is given in the report to the team that works together to improve students' academic performance and attendance. The document highlights that collaboration between students and teachers on setting the timetable results in a less stressful learning environment, and has also led to a reduction in cases of plagiarism and cheating. The report also emphasises that responsibility for student academic achievement does not belong to individual teachers or students but is shared between them.

Parkview's *verksamhetsplan*, as already highlighted, places particular emphasis on teachers' level of expertise. Many members of the teaching body also occupy positions in the Swedish Department of Education, or work as researchers for universities and independent research institutions. The document describes teachers as free to plan and experiment with new pedagogical approaches for their courses and reports that they are encouraged to further their studies or carry out exchange programmes with schools in other countries.

In its report, St. George's highlights the importance of teachers as facilitators of student learning and well-being, as well as their responsibility for maintaining a welcoming learning environment in school. Teachers also have a pastoral role as mentors for groups of students throughout the three years of upper-secondary education. The report emphasises in particular teachers' critical role in preventing bullying and acts of intolerance in school.

In contrast to the other schools, the Global Education Academy's *verksamhetsplan* places a strong emphasis on discipline. Action plans must be put in place to prevent and tackle episodes of violence and bullying and parents are invited to work closely with the school management team in this respect. As highlighted above, the Global

Education Academy's report also emphasises a results-oriented approach to education, and the strong, one-to-one relationship that teachers must establish with their students in order to help them improve academically. This relationship is conceived primarily as a provider-customer relationship (conveyed in the text by the use of words such as satisfaction and attainable results). The Global Education Academy report also specifies that most teachers must hold an official teaching qualification.

Southbank Academy's report also refers to teacher qualifications, stating that more than 50% of its staff are fully qualified. The report also highlights that teachers originating from overseas are required to obtain a Swedish teaching qualification in order to work for the school. In addition, teachers at Southbank Academy are required to use materials available on the on-line platform run by the school's managing company. Both teachers and students are given handbooks explaining the school routine and how the pedagogical model works, and they are expected to follow this model (explained in more detail below). In Southbank Academy's *verksamhetsplan* teachers are positioned as having a pivotal role as academic coaches. They are responsible for meeting with a number of students individually every week and for helping them organise their study time in order to achieve the grade-goals set for them at the beginning of each term.

As was the case for Parkview, Stoneville's report expresses a commitment to employing teachers who are highly qualified, with solid professional experience. The school's teaching body is approximately half Swedish and half from English speaking countries. Stoneville's *verksamhetsplan* asserts the importance of having English, US and Australian teachers, as they can facilitate smoother transition of students to overseas universities. This again emphasises an instrumental and market-oriented approach to internationalisation. Particular emphasis is given to extra-curricular projects supervised by teachers. Teachers are also responsible for detecting and making an initial informal assessment of any learning difficulties. Stoneville is the only school in the sample that appears to be consistently focused on this point, and it is the only school that mentions the presence of teachers specialised in learning difficulties. Stoneville's report describes the procedures the school applies to identify students with learning difficulties, design particular study paths outside standard classes and in specially allocated groups, and to make special exam provision for these students. This is something very unusual in the Swedish school system and ethos, which is traditionally based on the inclusion of students with learning difficulties within the classroom.

5.5.4 Pedagogy

In relation to pedagogical approaches, the schools can be grouped into three different clusters, each with similar aims and practices that embody thinking from a different stage in the development of Swedish education policy.

The reports from COSS and Parkview both outline a progressive pedagogical approach. This centres on project-based, cross-subject work, with students given the opportunity to collaborate in teams across the three-year age groups, as well as to work independently. Extensive freedom is given to teachers, who meet in pedagogical teams. 'Subject theme weeks' are also organised to focus on particular aspects of the curriculum. The schools' local curricula seem to embrace the principles of international education as outlined by Bond and Scott (1999).

COSS highlights in its report the importance of offering a large number of foreign modern languages as part of the school curriculum. The education the school offers seeks to broaden students' perspectives and their understanding of a sustainable, globalised society (*hållbart globaliserat samhälle*). The ability to communicate in more than one language is considered pivotal to this. As well as a number of European and other languages, all students from a non-Swedish or mixed background have the opportunity to study their *modersmål* (mother-tongue) with native speaker teachers. Again the procedural interpretation of internationalisation features clearly in such an approach.

COSS promotes student-teacher cooperation regarding pedagogy through discussion teams, comprising staff as well as students. There are also six pedagogical teams of teachers. According to the *verksamhetsplan*, the main aim of these teams is to define and agree on what constitutes 'meaningful teaching' (*meningsfull undervisning*) and how this can be implemented in school. The teams are also charged with finding strategies to balance the heavy workload students must manage throughout their three years. In COSS' report, team-work and cooperation are identified as key elements of school life. Professional peer assessment is also encouraged, and students are encouraged to carry out project work in teams, often involving different year groups. This kind of activity is felt to enhance 'students' critical skills as well as a constructive community of learners' (page 7).

In its report, Parkview promotes integration of arts and music within its scientific programme. The school states the importance 'of preserving the study of aesthetic subjects that have crucial importance in the holistic development of students, and that are disappearing from the general school offer' (page 3) as scientific and vocational programmes are prioritised in the current school market. In Parkview's *verksamhetsplan*, a flexible approach to teaching and learning centred on students' all-rounded development is strongly emphasised. Unlike at COSS, student involvement in pedagogical decisions or scheduling doesn't seem to be part of school practice. Rather the document emphasises recurrently the expertise of the teaching body, by highlighting the awards they have achieved nationally and internationally, and the projects they have been involved in outside the school.

Parkview's pedagogical approach is described in the *verksamhetsplan* as being based on 'simulation as a learning practice' (page 2). The school works predominantly with two cross-curricular projects, the 'Model United Nations' and the 'European Youth Parliament'. 'Through simulations students will develop the ability to research and analyse data critically, as well as communication skills and problem solving' (page 2). Teachers schedule and organise theme weeks where they can focus on particular aspects of the curriculum. Maths weeks are said to have been particularly successful in previous years. As in the case of COSS, Parkview's *verksamhetsplan* draws attention to the importance of building a community of learners, and emphasises that learning results from group cooperation.

The cross-curricular, project-based approach evident in reports from COSS and Parkview mirrors some of the ideas set out in the 1969 and 1980 curricula in relation to internationalisation of the curriculum (Bond and Scott, 1999; Hanson, 2010). In particular, the two schools' approaches reflect the idea that students' work doesn't need to be organised into subject areas, but that content and methods should be adapted in light of current societal challenges and in order to help students develop different perspectives (historical, environmental, scientific, social, cultural and aesthetic).

A teaching method based on problem solving is partly adopted by St. George's and the Global Education Academy, although their *verksamhetsplanor* do not mention extensive group work or projects mixing different year groups. The main focus for both of these schools is on increasing students' life-chances and confidence. Of the two, Global Education Academy's report, as noted above, draws particular attention

to discipline as a fundamental element of the school ethos that enables the achievement of other school goals.

As mentioned in a previous section, in their reports St. George's and the Global Education Academy focus on students as individuals, whose life and career opportunities can be enhanced through successful education (*framgångsrik utbildning*). Student-teacher relationships are strictly defined, whilst no mention is made of extra-curricular activities and students' independent initiative. In the case of the Global Education Academy, the relationship between students and teachers is described as a one-to-one mentoring relationship, with a clear academic focus. Teachers are ultimately responsible for students' development in terms of achieving grades, and for designing 'action plans' for those students who do not perform to a certain standard.

Teaching at both schools is aimed at developing students' functional skills (*funktionella förmåga*). The Global Education Academy's report, in particular, highlights school partnerships with external institutions, which offer internships and other professional training programmes. St. George's *verksamhetsplanor* focuses particularly on developing students' confidence through meaningful relationships with mentors and teachers. Pastoral roles appear to be very important in the school, as well as language support for students with a non-Swedish or mixed background. There is again a focus on students as individuals, and there is little mention of their involvement in the community. Neither St. George's nor the Global Education Academy's *verksamhetsplanor* articulate their pedagogical vision in any great detail. Greater importance is given to the analysis of grades and performance.

Southbank Academy and Stoneville take this approach to the extreme. In their reports, both schools explicitly identify themselves as results-oriented, focused on exams and preparation for further studies. Teachers' workload appears subject to a strict accountability regime and their performance is evaluated continuously throughout the school year. At Southbank Academy, teachers who fail to receive high scores in student surveys have to attend special meetings with their school principal and outline an action plan to be regularly reviewed. The pedagogical models of these schools are described in relation to the results they achieve and a strict division of roles and responsibilities, as outlined in the section above on school management.

While Stoneville's report doesn't mention a particular pedagogical approach, it asserts the value of a regime in which subjects are clearly defined, teachers are held responsible for delivering courses, assessment is largely summative and student performance is quantified. Teacher-student relations are academically focused and strictly formal; the school markets itself as based on the structure and ethos of a traditional English public school. Academic subjects are integrated with extra-curricular activities, and no mention is made of the holistic development of students. The school advertises itself as a 'high standard' academic centre (*hög nivå akademiskt centrum*).

Southbank Academy's *verksamhetsplan* states that the school has been designed in line with David Hargreaves' model of personalised learning (2004). However the school's model lacks some of the 'gateways' described by Hargreaves, in particular formative and self-assessment and peer group work. The school follows the pedagogical model of its chain, which is based on individual mentoring and an individualised workload for students, who are not grouped in traditional classes. The report outlines the main pillars of this approach, including: a programme of individual tutorials; a flexible schedule; and resources hosted on an intranet portal. In tutorials, teacher mentors meet their students on a one-to-one basis and follow up on their academic work. These mentoring meetings have an academic rather than a pastoral purpose. A flexible timetable is set up so that students attend only those lectures and seminars that their mentors schedule for them. The intranet portal hosts course materials, in subject sections. Mentors/coaches must set specific and realistic grade goals with each student at the beginning of every term. Southbank Academy is the only school in the sample that makes use of predicted grades, both for marketing purposes and to inform planning of future school strategies.

5.5.5 Assessment

Approaches to assessment reflect each school's distinct vision. In their reports, some of the schools dedicate space to an extensive description of results from previous years. Others discuss assessment in more theoretical terms. One main difference between COSS and the other schools is that COSS states that its mission is to ensure no student leaves the school with a 'fail' in any subject at the end of the year. All the other schools outline a mission to achieve the highest grades for as many students as possible.

Parkview and COSS do not include an analysis of grades in their *verksamhetsplanor*. They both include results tables in an appendix, but grades are not mentioned in the main body of the documents. COSS states that it has many applicants and therefore the school has the privilege of admitting students who have already achieved excellent academic standards up to year nine. Parkview doesn't explicitly discuss assessment in the school statement.

COSS' report focuses largely on the importance of formative assessment to enhance student learning. According to the *verksamhetsplan*, all teachers are required to work in such a way that helps students reflect on their learning and be active in their own assessment. In this way, the school hopes students will shift their attention from grades to the process of learning, which will in turn, eventually, lead to good final results (page 8). The attention to formative, continuous assessment is also linked to a better understanding of the new grading criteria, introduced in the 2011 reform. COSS intends to involve assessment experts from the Ministry of Education in offering guidance on the assessment policy the school is developing.

The other schools in the sample devote more space in their reports to an analysis of grades and student performance. Southbank Academy's teachers/mentors are required to set clear learning goals (*inlärningsmål*), in the form of grades. These must be achievable as, it is argued, inflating grade-goals may lead to disappointment and lack of trust in the school (students' self-confidence is not mentioned in the document). For the Global Education Academy, Southbank Academy and Stoneville the assessment process is strictly summative. Of these three institutions, Stoneville demonstrates the most distinctive approach to assessment in its *verksamhetsplan*. As mentioned, the school has a special department for the identification and support of students with learning difficulties.

5.5.6 Work environment and attendance.

Among the six schools, the Global Education Academy is the only one that makes explicit reference to discipline and related concerns in its *verksamhetsplan*. A strictly regulated procedure is in place to deal with cases of bullying. This involves teachers, the principal and parents. The school encourages parental involvement in all discipline issues, and parents are involved as much as possible in meetings and anti-bullying initiatives.

COSS and Parkview do not mention discipline problems in their documents, but they both outline how effective and meaningful teaching (*meningsfull undervisning*) is vital to ensuring that students continue to attend classes. Parkview's report highlights the importance of letting students manage certain activities independently. COSS states in its report that attendance is one of the topics addressed jointly by students and teachers in discussion groups, and it too acknowledges that good teaching is key to improving student attendance. Stoneville's report emphasises the benefits of a calm and respectful learning environment where students have the opportunity to focus fully on their studies. A commitment to maintaining this environment is part of the school ethos and all students are expected to contribute. Attendance in Southbank Academy is agreed between students and their teacher-mentors. A schedule is designed weekly and students are supposed to stick to the plan designed to help them reach their 'grade-goals'.

One interesting theme evident in some of the documents analysed is the idea of teachers' responsibility for student behaviour, which seems to contradict the emphasis on personal responsibility and even the notion of entrepreneurship highlighted in the curriculum. At COSS, strategies to improve attendance are part of a process of student-teacher cooperation, and at Parkview, students' own initiative and activities are regarded as critical in encouraging engagement with the school. In contrast, at Global Education Academy, Southbank Academy and Stoneville, adult professionals are regarded as primarily responsible for following up on students who are perceived as failing and/or absent. At Southbank Academy and Global Education Academy, members of staff are also required to be visible and present during the day, for example in the corridors at break time. Indeed, Southbank Academy's *verksamhetsplan* mentions that teachers can have free meals in the canteen as long as they eat with students rather than sitting separately with other members of staff. This picture challenges somewhat the idea of school as a place where students are equipped to take responsibility for the challenges of university or of professional life.

This analysis of the six *verksamhetsplanor* of international upper-secondary schools in the municipality of Stockholm highlights the different interpretations and constructions of education permitted by the notion of equivalence. The six schools can be placed on a *continuum* representing the range of interpretations of equivalence, from initial conceptualisations emphasising respect for students'

individuality, to more recent ones focusing on results and accountability. Different positions on this *continuum* imply differences not just in pedagogical approach but also in the role of staff and the general organisation of school life.

Internationalisation, as well as equivalence, appears to be differently constructed at each school; in the majority it is reduced to the idea of teaching the Swedish curriculum in English. Although all the sample schools brand themselves as international, none of their reports includes a specific section explaining what internationalism means for them. However, the schools that can be placed towards the end of the *continuum* that represents traditional interpretations of equivalence (COSS and Parkview) offer an interpretation of international education that emphasises building an understanding of different cultures. The other schools seem to emphasise an idea of education that is geared to preparing students to compete in the international higher education and labour market.

5.6 Conclusions

This chapter offered an overview of different interpretations of internationalisation and sought to illustrate how equivalence and internationalisation of the Swedish curriculum is constructed differently by different schools. By placing the six schools on a *continuum* representing different constructions of equivalence from the early 1980s to 2000s the chapter explored how schools embody and enact equivalence differently and how this affects the way they relate to students, staff and the concept of internationalisation. The paradigm defined as the 'market model' by Knight (1999) and Warner (1992) seems to be predominant in the majority of the sample schools. This will be discussed further in Chapter 8 in relation to constructions of quality, which have come to be interpreted in the narrow sense of comparable results and success in the international market.

While the six schools analysed in this chapter define themselves as international, none of their steering documents feature a specific section on internationalisation. However, COSS's document sets out a commitment to preparing students for global citizenship by developing environmental awareness and mutual respect for others in a diverse student body, and through the provision of various languages in its curriculum. Parkview focuses on international collaboration and a cross-curricular approach. Its approach closely reflects procedural interpretations of internationalisation in terms of critical engagement and the negotiation of values. At

Southbank Academy, Stoneville and the Global Education Academy, the 'market model' of international education seems to be dominant. The steering documents of these three schools suggest they are primarily focused on ensuring students can compete in the globalised academic and labour market. The interpretation of internationalisation as global citizenship apprenticeship is largely absent from the schools' steering documents (with the exception of COSS and partly Parkview). Instead, internationalisation tends to be interpreted in the narrower sense of delivering the curriculum, or part of it, in English, as will be illustrated further in Chapters 6 and 7. International is often conflated with 'English' in these reports, in which dimensions of critical multiculturalism are for the most part not even considered.

Equivalent education also seems to be differently interpreted in the six schools. Parkview and COSS's interpretations appear to be closely linked to initial conceptualisations of the term (analysed in Chapter 4), which emphasise respect for students' individuality within a common frame of reference. At the other end of the spectrum, schools such as Southbank Academy and Stoneville appear to embody a construction of equivalence in terms of the achievement of quantifiable results under a closely monitored work regime designed to standardise practices among staff and students.

Having analysed the steering documents of all six schools, two schools were selected for the case study project central to this research. These schools are Parkview and Stoneville. The schools offer the opportunity to make interesting comparisons, situated as they are on opposite ends of the equivalence spectrum previously described, but both being independent and belonging to organisations with a similar number of high schools and students in Stockholm. The two schools also offer the same academic programmes, and neither offers a vocational programme. Being independent, they are both subject to the same budgetary restrictions (they receive money per number of students enrolled). All these factors make it easier to carry out a meaningful comparative study of the two schools and their different models of education.

Chapter 6

Organizational practices and branding identities

6.1 Introduction

Parkview and Stoneville represent the most pronounced and diverse examples of the way equivalent education has been embodied in school ethos and practices, as the document analysis in Chapter 5 suggests. Both schools offer academic programmes only (scientific and social programmes, plus an aesthetic programme in the case of Parkview and the IB diploma programme in the case of Stoneville), and market themselves strongly as international (in that some of their teaching staff come from English speaking countries and teach in English). The interpretation of internationalisation offered by the schools is based predominantly on the 'market model' (Warner, 1992) described in Chapter 5, although with some distinct differences. By delivering the curriculum in English the schools aim to offer more international opportunities for their students. Although the pedagogical approach of Parkview, as outlined in Chapter 5, integrates principles of interdisciplinarity and social engagement, a coherent and consistent approach to 'global citizenship' (Barrie, 2004) or critical multiculturalism is not explicitly mentioned in the schools' steering documents.

This chapter provides a detailed presentation of the two case study schools, focusing in particular on their organisational practices and the way they forge identities that serve distinct branding strategies. These identities are constructed as linking closely with traditional Swedish and English education traditions. The chapter will show how these traditions relate to the curriculum and the Swedish education system more generally. It will also investigate how and to what extent different branding identities and practices involve different constructions of equivalence as well as the performative effects of these constructions on curriculum delivery and staff identity. Subsequent data chapters will explore: the pressure of inspection and how constructions of equivalent education affect the relationship between management and staff in the case-study schools (Chapter 7); the consequences of new assessment policies for equivalent education (Chapter 8); and the role of teachers (Chapter 9).

6.2 Case study schools

The two case study schools are located in different areas of central Stockholm. Parkview is in central-east Stockholm, an elegant and exclusive neighbourhood. It was one of the first independent schools in Sweden, and opened in 1994. Parkview's student population is fairly homogeneous, with the vast majority of students coming from a Swedish background and living in the proximity of the school. Parkview currently has approximately 430 students. Although the school's management believe they could technically accept another 50 per year, it has deliberately limited numbers, so that, in the words of the Deputy-Principal, 'we can concentrate more on our students' needs' (Deputy-Principal, Parkview).

Stoneville is located at the border between central Stockholm and the southern suburbs, where the majority of its students live. The school is fully subscribed, with more than 700 students. The student population is very diverse; most students have at least one parent from a country other than Sweden, or belong to Swedish families that have moved back to the country after living abroad. The school has recently closed one of the academic programmes it was offering (Natural Science B), as 'it was attracting the wrong type of students, not hard-working, not achieving' (ex Deputy-Principal, Stoneville).

The use of the term equivalence by staff at both schools can be detected in relation to the same two, distinct spheres: goal attainment in terms of school performance; and the assessment of students. When referring to the framework of education (in both documents and interviews), both schools consider themselves part of a mechanism of accountability in which they must ensure students fulfil curriculum goals (as highlighted in the 1994 and 2011 curricula). Both schools also acknowledge that they play a crucial role in promoting greater equivalence (meaning comparability across schools) through evaluations and assessment and implementation of changes designed to facilitate and enhance the achievement of goals.

Despite this common interpretation of the term equivalence, however, each organisation seems to reflect a different construction of the concept. At Parkview, this is a pre-1992 construction, as respect for students' individuality within a common framework focused on shaping all-rounded individuals. At Stoneville, this is

the construction set out in the curriculum from 1994 on, focused on attainment of national goals.

6.2.1 Parkview

Parkview was founded as an education foundation in 1994, the year in which the first of its three upper-secondary schools was founded. The foundation is managed by an advisory board (comprising six Swedish educationalists and well-known entrepreneurs), which reinvests any profits in the schools themselves. Parkview's website has a page dedicated to its advisory board, on which the names of the members are listed, but no further information on their background is provided. However, the history of the foundation is detailed on the school's website. In brief, the impetus came from a parent who wanted to set up a more dynamic and creative environment in which to educate her children. This focus on dynamism and creativity drove the innovative pedagogical model the school aims to offer, which is based on cross-curricular projects, collaboration with external institutions, hiring of highly qualified teachers, and extensive use of IT resources. Parkview's ethos is progressive. Its pedagogical approach involves mixed-year groups for some courses, and interdisciplinary, simulation-based work designed to enhance students' participation and motivation. This approach is designed to allow a degree of differentiation according to students' abilities and choices within a common framework in which no student is excluded or overlooked (Parkview's *verksamhetsplan*, 2012 and 2013). As such, the approach closely resembles the pre-voucher reform conceptualisation of equivalence as differentiation and respect for students' individuality.

As well as being a document for internal use and local goal setting and review, the *verksamhetsplan*, analysed in Chapter 5, is used for marketing purposes. It features a mix of corporate language (focusing on notions of excellence, prestige, international recognition etc.) and traditional professional language (focusing on teaching and pedagogical expertise). This mix is also reflected in the language teaching staff use to describe their work at the school. As will be analysed later in this chapter, it seems a pre-voucher reform conceptualisation of equivalence is serving a particular marketing aim: to locate the school within a certain tradition of child-centred and progressive pedagogy that was once typical of Swedish education (as represented in the 1969 and 1980 curricula).

Pedagogically, the school promotes a cross-curricular approach to academic work. Aesthetic subjects, such as music and applied arts, are also offered to students attending national programmes that do not include them as requirements (such as natural sciences). This helps ensure the education provided is rounded rather than strictly instrumental. In fact, Parkview is the only school in Stockholm offering aesthetic subjects to science students as part of a shared programme and it does so:

to contrast the tendency of offering only those set of subjects that students choose to be accepted at university and nothing more. Schools tend to save money on art and music and focus on offering those subjects that attract students as they guarantee access to university, such as the sciences or economics. We want to oppose this and offer a combination of arts and science. There is no contradiction between studying music or drama or sculpture and maths... or science. We want the students to understand this. That's why we have mixed programme courses where you have the aesthetic programme students and science programme students joining together for languages or performing arts.
(Deputy-Principal, Parkview)

Students from different year groups attend the same optional classes and assessment models leave freedom for students to choose how to be evaluated (e.g. in modern foreign languages students can choose to put on a performance or to carry out more traditional work such as a presentation or a written essay). The rationale for this choice lies in the idea that students need to be exposed to peers with diverse skills and creativity, both to encourage bonding across subject and year groups and to break down ideas about supposedly more prestigious programmes. In particular, the school wants to challenge the idea of 'scientific intelligence and logic-minded students being superior' (Deputy-Principal, Parkview).

The school also places considerable value on extracurricular activities. Students are encouraged to take part in voluntary work with local charities in a number of sectors (from providing assistance to elderly people to organising cultural events). Every Friday students are free to perform, or to set up a presentation or exhibition, in the school canteen at lunchtime. Students are entirely responsible for the organisation and management of these events, from sourcing and using equipment to promotion. These lunchtime events are extremely popular, and during my visits I noticed that they attract both students and staff and foster collaboration and discussion between them. Students tend to stay on late into the afternoon on Fridays as a consequence. Students also run school clubs and an IT helpdesk. Parkview has a strong focus on IT and TEL (technology enhanced learning) and each student is given a laptop by the foundation. Having said this, during my visits I spotted many students using their

own devices, of different brands, while working in the allocated study areas along corridors.

At Parkview, the layout of the premises also encourages integration among students and between students and teachers. The study areas referred to above are set up along the same corridors where class and staff rooms are located. There is no physical separation between academic and recreational space, and students can easily access staff by knocking on their doors. While study areas are set out with tables and chairs, along the corridors there are sofas and cushions as well. Next to the canteen on the ground floor are table tennis tables for students to use and, in the area next to the support team's office (where the nurse and dyslexia specialist are located), there are massage chairs, carpets to sit on and anti-stress toys that students can play with. Music is played in this area, as well as in the art workshops on the top floor and in the canteen. Classroom furniture can be used flexibly and arranged according to the requirements of the lesson. Teachers and students are free to move furniture around as long as they take care to move it back at the end of the session. In order to help facilitate that, a picture with a preferred layout is displayed on each classroom door. Each individual classroom is equipped with a projector and an area for laptop connection. Teachers are encouraged to bring their laptops to class and work directly from them.

Parkview owns its premises. The building dates from the late 1800s, overlooks a park and is partly used as a ballet academy (in a separate wing from the school). The school rents out some of its rooms to a local institution organising evening classes for adults, by doing so generating extra income. The school canteen is located on the ground floor, in a room previously used as a theatre. Its stage and theatre-style lighting system make it a very suitable place for the school performances discussed above.

The links between the school and the world outside, highlighted in its steering document, are evident in the selection of staff. Parkview employs professionals with a background other than in education, although a Swedish teaching qualification is required. Many members of the teaching staff work part-time for the school and part-time as professional musicians, artists or university researchers. The teaching body encompasses a variety of perspectives and different identities and professional specialisms, and teachers are given great freedom to work independently. Staff offices generally host 3 or 4 teachers, and a staff room with

sofas, a dining table and a kitchen is located on the second floor. Teachers do not have to be in school unless they have classes or meetings. As a consequence of working very independently from each other, some members of staff seem not to know their colleagues very well. During my visits some teachers struggled to give me information about where colleagues were based in the school. In contrast, students were always willing and able to show me around. Indeed, students always appeared to be interested in my presence, and often approached me to ask me who I was and if I needed any help or information.

As mentioned above, a support team is in place in Parkview comprising a nurse and a dyslexia specialist. Their role is to advise teachers, as well as to help individual students, so that support can start early, but without creating unhelpful divisions among students. Teachers are offered workshops and support to help them design class activities that allow students with learning difficulties to integrate with the rest of the group: 'we do not want anybody to feel different or needing to be separated; we work in a way that makes sure everybody is involved' (School Nurse, Parkview).

Over the past two years, Parkview has been collaborating on assessment with a municipal school in Stockholm offering the same programmes. Teachers are invited to participate in mixed-school meetings where grade descriptors are discussed and a common approach to assessment is generated.

Finally, the Principal and Deputy-Principals (one academic, two administrative) at Parkview have been selected from among existing staff and have worked for the school for a long time. Teachers at Parkview are encouraged to contribute to school development by taking on extra responsibilities. Some of them, after trying out a managerial role within the foundation for a while, have decided to return to their teaching positions.

6.2.2 Stoneville

Stoneville was registered as a limited company (*aktiebolag*) in 1999. The school is owned by a US enterprise and administered by a CEO and a management board whose members mostly originate from the United States and have a background in investment banking. Stoneville's website features pages dedicated to the company's structure, with introductions to the CEO and other members of the senior management team (both Swedish and US), including their backgrounds, achievements and goals for the company. In documentation and marketing

materials, Stoneville constructs its profile in terms of high achievement, and solid preparation for university studies. The school emphasises self-discipline, hard work and pushing individual limits. Teaching and learning differentiation is not part of the school ethos, but values like commitment, honesty and respect are. A clear differentiation between academic work and social life is set by the school's 'house system'. The houses provide the 'context' for student socialisation and group activities, whilst academic work is mostly constructed in terms of individual effort. The school focuses consistently in its *verksamhetsplan* on the 'non-Swedish' approach to education it offers. This is conceptualised in terms of a structured and clear-cut approach where the roles of students and teachers, and their mutual responsibilities, are clearly defined. Although national goals are not explicitly mentioned, a focus on the attainment of results and a pragmatic approach to education are evident in the document, in particular with reference to university selection.

Students are divided according to the programme they are attending and the house system. Extra-curricular activities related to the house system are scheduled outside school time and are designed to enhance a sense of competition and achievement in students. All activities are organised and supervised by members of staff. These include sports and tournaments focused on other topics such as rhetoric or chess. Competition winners are celebrated by having their names and pictures featured on posters around the school. Stoneville has two football teams (one female and one male), both active participants in the Stockholm school league tournament.

We are investing quite a bit in the football thing. There are two things here... we receive more money from the council when we care about students' health and healthy lifestyles... and also, but this is something students don't know... it is a way to keep an eye on them. Students chat, open up with their coaches... so if there is a problem, we are the first to know.

(Alex, Wellbeing Team, Stoneville)

In contrast to Parkview, the layout of the premises at Stoneville does not encourage a flexible use of space or mutual exchanges between students and staff. Stoneville rents its premises, a building from the 1930s arranged over four floors. The building was originally built as a drama academy and includes a theatre, which is used for house competitions. The staff quarters are set in a dedicated area which is not accessible to students. Members of staff sit in one staff office which is directly connected to the staff room, with sofas, a kitchen and a piano. Members of staff seem to know each other very well. The office they share is divided into subject

areas; there is a subject head for every area who coordinates and manages the work of other teachers.

Each of the four floors of the building is assigned to a particular house, and all the classes and activities relating to that particular house group take place on that floor. This means students can maximise their working time by eliminating distractions, but also that they interact only with their class group during school time. There are no study areas in the corridors; instead a strict silence policy is in place there. School decorations emphasise the importance of competition between houses and students; in each corridor pictures of successful students are displayed, together with medals and other trophies. Students can be seen in photos dressed in house colours at school events or in official gowns at graduation ceremonies. Posters with slogans such as 'give respect, get respect' or 'focus, motivation, integrity' can be found on each notice board on every floor, in the school library and in the canteen.

In addition to the library (which is accessible to students only once permission from the librarian is granted), the school has a study area for students. This is located on the ground floor, at the bottom of the corridor on which the offices of the Wellbeing Team are located, and separate from the classrooms and the staff quarters. The Wellbeing Team comprises a nurse, a counsellor, two special-needs teachers and two student 'surveillance' officers, whose role is to ensure the level of noise is kept low and 'acceptable behaviour' is maintained (Alex, Stoneville). The student area is the only part of the school where students can use mobile phones or play music. During my visits I noticed, however, that the room is empty most of the time and that students prefer to leave the building and meet in local cafes during breaks or lunchtime. The school is in fact not very busy after class time, when for the most part only staff can be found in the building.

Stoneville's schedule is organised according to standard subject divisions; cross-subject work is not part of the teaching philosophy of the school. Stoneville's teachers do have freedom in the way they plan and deliver their courses, as is the case for their Parkview colleagues. However, they are asked to design common tests and elements in their coursework, to aid standardisation of the grading process. The focus on results, competition, and pushing students to achieve more ambitious goals is clear from interviews with staff at Stoneville. Teachers employ a discourse of excellence and competition as well as a discourse of business, in which students are addressed as clients, whose requests need to be satisfied. The large support team at the school aims to help students to achieve high grades. In

contrast to the Parkview support team, it does not work in collaboration with teachers to enhance differentiation in class, but identifies students in need of additional help, who are then scheduled private sessions with special needs teachers. The rationale for this approach is that it allows more individualised support for students who may be at risk of not being accepted by prestigious universities.

Stoneville's students are considerably more mixed, both ethnically and socially, than those at Parkview. Parkview seeks to enhance the individuality of the members of its homogenous student body by investing in their individual talents and interests. Stoneville seems to take the opposite approach, in which the diversity of the student population is 'ironed out' through a set assessment process that regiments students' performance and skills. Stoneville's teachers and its documentation refer to the importance of mutual respect in order to create a constructive and productive learning environment. Mutual respect is said to be achieved through common rules and the development of clearly-ordered academic learning paths in which students are expected to reach the same goals (a process facilitated by a tightly controlled system of testing).

As is the case for students, members of staff at Stoneville are also very diverse, coming from different countries (the UK, United States, Canada, Australia, India, France, Zimbabwe, Spain and Sweden) and social backgrounds. During my visits I found the staff very caring and available to help me or dedicate time to me. Students, however, did not show any particular interest in or curiosity about my presence in the school and on few occasions actually mistook me for a member of staff. In contrast to students at Parkview, they never approached me to ask whether I needed help, and tended to avoid eye contact and switch their language from Swedish to English every time I happened to pass them in the canteen or in the corridors between classes (the school language policy is English only and students are not supposed to socialise in another language).

Stoneville's Principal, who I met during my first visits to the school, left in January 2013 together with one of the Deputy-Principals. The new Principal was not previously a member of the school and was recruited after an international selection process from an English-speaking country. The second Deputy-Principal, on the other hand, was previously a member of the school's teaching staff.

Although Parkview and Stoneville are in many ways considerably different, what is common to both schools is the lack of a cohesive pedagogical vision shared across the teaching body, despite the statements set out in each school's steering documents (which emphasise role-play and cross-curricular projects at Parkview, and academic subject division at Stoneville). Teachers at both institutions are not asked or encouraged to follow a preferred pedagogical model or approach. This will be analysed further in Chapters 7 and 8.

6.3 School identity: the English-Swedish dichotomy in the light of the Swedish curriculum

As highlighted above, each of the two schools draw on different education traditions, which shape the respective ethoses and practices of the schools in clearly distinct ways. Parkview constructs itself as a school embodying the founding values of Swedish education (drawing on a pre-1992 discourse concerning the shaping of the whole person through education). In contrast, Stoneville presents itself as embodying an alternative model of education based on a supposed English model (focused on academic attainment and results). These two contrasting models are used by the schools to promote themselves in the Stockholm education market via posters, leaflets, and advertisements in local newspapers and at underground stations. Fairclough (2010:101) has observed that: 'institutions of higher education come increasingly to operate (under government pressure) as if they were ordinary businesses competing to sell their products to consumers'. Although this quote refers to higher education, it applies equally in the context of this research, as schools increasingly construct themselves as businesses in the Stockholm school market. Each school, following its own model of education, has also interpreted the curriculum in distinct ways, taking advantage of its flexibility and the 'steering by objectives' approach which allows for considerable freedom in the way that goals are attained.

In an analysis of the 2011 Curriculum Sundberg and Wahlström (2012) examine the development of Swedish education from an international and European perspective. The authors argue that, by introducing a European marking system and focusing on skills rather than knowledge (European Commission, 2001), the latest reform of upper-secondary education promotes a 'denationalised and instrumental conception of education'. They argue that the changes have created a 'standards-based' curriculum shaped by two powerful international influences: a technical-instrumental

discourse, emphasising the form, structure and function of the curriculum; and a neo-conservative discourse, emphasising curriculum content as a given and uncontested body of knowledge.

Nilsson (2000), Simic (2000) and Englund (2001), analysing the stricter academic subject division implemented from 1994, also point out that uncontested 'knowledge' emerges as a key concept in the curriculum. A solid knowledge base in specific subjects is regarded by curriculum authors as absolutely necessary to give students a real understanding of present-day events (Motion 2001/2002, Ub:249, see Elgström and Hellstenius, 2011). Furthermore, comprehensive knowledge is positioned as something that only specialists can impart: that is, by teachers with a solid disciplinary background (Motion 2000/2001, Ub:313, see Elgström and Hellstenius, 2011). This discourse served as a powerful precursor of debates about the reform of teacher education, discussed in Chapter 4. The 2011 Swedish Curriculum based on neo-conservative principles of subject teaching and steering by objectives, but lacking prescription in terms of pedagogical approaches (see Chapter 8), creates the conditions for multiple interpretations.

As shown in Chapter 5, the concept of internationalisation can also be subjected to different interpretations and constructed both in an essentialist way (associated with traditional 'Western' and 'Christian values') or in a procedural way (associated with the development of critical skills for constructive cohabitation). However, as noted in Chapter 5, a truly cosmopolitan pedagogy, informed by a non-discriminatory and non-Western critical humanism (what Gilroy (2004) termed 'planetary humanism' and Said (2004) 'democratic humanism') is not explicitly stated as an aim in the curriculum. Rather it is only suggested by the second, procedural interpretation. As mentioned, neither school (in reports or marketing materials) explicitly links their interpretation of internationalisation to ideas of global citizenship or social transformation. Parkview's cross-curricular work and international collaborations do in fact reflect some important aspects of an international curriculum. However in Parkview, such an approach is supported not in terms of its benefit for society but for the all-rounded development of its students. For both schools, being 'international' involves a narrower and more instrumental interpretation of internationalisation, which focuses on teaching of the Swedish curriculum in English, by native English-speaking teachers: 'We are international in the sense that about one third of the staff is from an English speaking country and the working language is English' (Anna, Parkview). The rationale for such an approach is to target a

student population aiming to further their university education in English-speaking countries: 'Our kids are well-travelled and they want to study abroad, that's why we are so popular, as we teach them in English and prepare them for that' (Alex, Stoneville). 'They want to go to Yale, Harvard, Oxford' (Michael, Parkview).

Against this background, the next section provides an analysis of the cultural traditions embodied in each school.

6.3.1 Parkview: 'the organisation' and the tradition of Swedish education

The language of business and private enterprise is used by teachers at both schools to describe their employers. At Parkview teachers mostly refer to the school as 'the organisation' (the term occurs 57 times in 8 interviews); whilst in Stoneville the school is often referred to as 'the company' (45 times in 12 interviews).

Parkview teachers tend to reflect critically on the implications of working for the 'the private sector, the business world' (Anna, Parkview) and highlight the unique importance of their independent academic role within the organisation. By inhabiting a subject position focusing on their academic expertise, and adhering to a traditional education discourse (emphasising subject competence, independence, and relationships with other institutions), the teachers construct their role as crucial to the organisation and its success. However, success is not necessarily interpreted in commercial terms; rather school managers are held responsible for commercial achievement and for setting the conditions in which teachers work.

Although one third of Parkview's teaching staff come from English speaking countries and are qualified abroad, the school requires that all of them gain Swedish teaching qualifications as well: 'it is important for the parents to know that all staff members are qualified in Sweden' (Deputy-Principal, Parkview). In interviews, teachers emphasise and celebrate the possibilities of Swedish education to promote teacher independence and professional development, as set down in the curriculum:

In the curriculum there is something called core content and goals. But the goals are terribly vague... the core content is some sort of check list... you have to cover 'industrialisation', but how you do that or the geographical area you choose is entirely up to you. I think I'm capable as a teacher to take something very vague and make it into content, but I think about new teachers, somebody coming into the profession for the

first time, it takes quite some time...but after you learn to work with it... it is terrific, highly empowering.
(Anna, Parkview)

However, while highlighting the value of a flexible curriculum that allows teachers to use their professional judgement, teachers also point out some of the potential risks of such an approach within a school market culture:

I think an important aspect of education is to give them [students] some sort of theoretical and factual framework and in that sense the current system, I mean all these free [independent] schools, seems to have dropped the ball because students leave school and they don't know anything. Learning how to learn should definitely be part of education because you want to become an independent thinker, but you have to have something to base your opinions on and many schools are not giving them that... they are getting their information from the internet... There is no ground for them to stand on and actually teachers are discouraged from giving them that ground, as they are so busy doing all these other things. .. but in reality the curriculum puts quite a lot of emphasis on the freedom and responsibility of the teacher. It is rewarding. So we are lucky here that we can focus on our expertise in this school, but certainly I'm worried for the future of Swedish education.
(Michael, Parkview)

In Michael's quote, the non-prescriptive curriculum, which has formed the core of the Swedish model since 1962, is considered an empowering tool from the teacher's point of view, as they can adapt it to the needs of their students and so construct a richer, more appropriate, learning experience. However, at the same time, there is a risk that the curriculum is trivialised in a school system in which teaching staff are busy with non-teaching tasks, and therefore lack the opportunity to develop sound teaching plans based on it. While acknowledging these risks, Parkview positions itself as drawing on the best aspects of Swedish education traditions without compromising on the quality of its teaching. In the above quote, Michael clearly differentiates between the good practice at his school and the potential bad practice at other schools resulting from the Voucher Reform ('the current system'), again affirming Parkview's position of advantage and prestige.

Similar comments apply to the informal organisation of the school and the student-teacher relationship:

My impression is that in year 1 we get more complaints from the students that they have too much freedom. We emphasise creativity and personal initiative and sometimes the students find it confusing. But in year 3 the situation is reversed. Once they understand that teachers are here to guide and not to set rules and that learning is as a matter of fact an interesting thing to do...they love being here, they are here all the time, you see it yourself.
(Peter, Parkview)

Parkview teachers paint a picture of the school very much in line with traditional ideas of a Swedish school, in which curriculum flexibility and school organisation contributes to a non-regimented model of learning based on encouraging student interest in and motivation to carry out school work. Staff members underline in interviews how their input as professionals and the time they are given to dedicate to their courses is essential for the realisation of such a model.

School visits proved an important opportunity to understand how this approach is put into practice. Parkview students stay in school after class and are offered plenty of opportunities to take part in a variety of school projects. Students appeared independent, confident, busy and generally curious. At the same time, however, teachers tend to work independently from one-another, meeting just once a week in mentor meetings. Subject meetings are run once a term (something that was not specified in the school steering document, where these meetings are given greater prominence). These meetings often take place as part of in-set days (in which teachers are encouraged to meet outside school to discuss planning for and progress in their subject).

I attended a mentor meeting, in which all mentors of year one students met to discuss their groups' progress. The meeting was not chaired by a particular member of staff and did not follow any specific agenda. The teachers participating shared their experiences of and concerns about the groups they were mentoring. They focused in particular on issues relating to student-led clubs. While students were organising themselves to start a number of new clubs, teachers wanted to help them adopt a more considered, longer-term approach focused on the development of new skills as well as being playful (this would prioritise activities such as the baking club over activities such as the ice-cream lovers club, which had the potential to last only a few weeks). A decision was taken to dedicate the following mentor meeting with students to reflect on the differences between a student club and an informal gathering. Teachers' effort in the meeting was geared towards finding a way to guide students while encouraging them to be responsible for their own choices. By doing so the staff were enacting one of the key tasks of the Swedish curriculum:

The task of the school is to encourage all students to discover their own uniqueness as individuals and thereby actively participate in the life of society by giving of their best in responsible freedom.

(2011 Curriculum:4)

Parkview positions itself as part of the Swedish tradition, by highlighting the importance of student independence and input and the potential of a non-prescriptive curriculum. It also emphasises the role and prestige of teachers by emphasising the importance of giving time and space to competent staff members to exercise their own initiative. In doing so, the school portrays itself as able to combine traditional values with the current demand for top results. As Michael's quote above highlights, this is something that differentiates Parkview from many other schools in Stockholm that are struggling to maintain a mixed curriculum and teacher time for planning in the face of demands from the current results-oriented, accountability system.

6.3.2 Stoneville and the English tradition

Teachers at Stoneville refer to the school as 'the company' and they make recurrent use of business language including words such as clients, results, performance, competition and market. A powerful element in Stoneville's identity formation is the emphasis on the 'Englishness' of the school, and on an education model aimed at attracting students (and their families) who do not feel fully accustomed to the Swedish system: 'here it is for people who maybe do not fit in the Swedish system as it is too Swedish. It is for people who have different backgrounds and that are encouraged to feel that they have the richness that is not recognised somewhere else where everybody looks the same' (Claude, Stoneville). This quote is particularly meaningful as it indirectly refers to the idea of 'Swedishness' discussed in Chapter 5 as an aspect of the identity of Swedish schools that seems antithetical to a critical multicultural approach.

At Stoneville, however, the majority of members of staff come from a country other than Sweden, including the new school Principal, who 'doesn't speak Swedish and wants things more and more in English' (Fredrick, Stoneville). Stoneville's supposedly 'English' approach is the unique selling point of the school emphasised in all marketing materials. Brochures and posters often portray students from mixed backgrounds wearing their house uniforms or graduation gowns (something that is completely alien to the Swedish tradition).

The same arguments Parkview teachers make about the benefits of the Swedish system are turned on their head by Stoneville teachers to emphasise the advantages of an English system. Stoneville teachers argue that their non-Swedish teacher training allows them to fully appreciate, and take advantage of, the benefits of the Swedish system without 'abusing it':

For me coming from the UK and seeing this system, I feel kind of privileged as I have the freedom but I am not going to abuse it because of my background. Whereas I think if you have grown up in a background... I mean I might be completely wrong this is just a guess I suppose, but for somebody growing up here that doesn't have anything to compare against, I think perhaps that it can be a bit more confusing actually because I think that expectations are very important.
(Lukas, Stoneville)

Lukas argues that his non-Swedish training ensures he appreciates and values the freedom he is granted under the Swedish system, whilst not succumbing to a lack of focus or organisation. However, the suggestion is that the rather loose Swedish model could be improved by becoming a little more solid and grounded. A recurrent argument in teacher interviews at Stoneville is indeed the perceived lack of structure in Swedish education:

There is a concern that Swedish schools are anarchy, which I am sure is not always the case. But Swedish schools have this bad reputation among our parents.
(Maria, Stoneville)

Other Stoneville staff members highlight the difficulties that come with a non-prescriptive curriculum and the consequences this can have for student perceptions and expectations:

I think the teacher gets too much freedom to carry and then becomes vulnerable... and then you switch into panic mode about what you should fill your lessons with... and you struggle to create a context... and then students start questioning your work and your grades.
(Marta, Stoneville)

Marta's quote highlights once more the performance-oriented culture at Stoneville. The preoccupation of teachers in this context is to avoid conflict with students and discourage them from providing negative feedback.

Stoneville teachers construct their and the school's identity in terms of providing the structure missing from the supposedly loose, traditional Swedish school. Structure and discipline are recurrent themes in interviews and frequent comparisons are made between an 'English' model of schooling (focused on empowering students by stretching them academically) and a more casual 'Swedish' model (supposedly characterised by a lack of student engagement and teacher commitment). Stoneville

teachers tend to highlight parental appreciation of and support for their education model:

The values of the school... I think the main thing is that we have an environment that we perceive to be much more structured in terms of how we want the school environment to be, in terms of respect, in terms of rules, in terms of expectations. Parents think being part of the tradition of British schools adds a little bit more discipline.

(John, Stoneville)

The highly regimented 'English' style of education that Stoneville follows is, in the view of Stoneville's teachers, superior not only in terms of results-oriented efficiency, but also in terms of 'caring for the student':

It's amazing how easy it is and how they like it in a way... we treat them as adults... it's our way of showing them respect too... we expect something from them; we are going to give them a lot of time and attention and energy and that comes with the package.

(Claude, Stoneville)

And I think there should be something more on structure and discipline at national level. I mean discipline in Sweden is seen as a negative word. I think discipline can be a proactive thing and should be a proactive thing of course you cannot discount the reality not all students like discipline. The achievers are disciplined.

(John, Stoneville)

The idea of student responsibility, which in Parkview is associated with giving students freedom and the tools to make independent choices with guidance and discussion, is conceptualised in Stoneville in terms of adherence to externally imposed rules and discipline. As Claude expresses it, discipline is the price students pay in order to receive attention and care from their teachers. A clear distinction between students and teachers is made at Stoneville. Learning does not result from the synergy between the two groups as at Parkview; rather it results from students following regulations set by staff.

As in the case of the curriculum, ideas about Swedish and English education also affect the way that teachers are evaluated:

Well, meetings are different. There is a difference between modern languages meetings and English department meetings; it's difficult to explain. Maybe the modern language department are more Swedish in a way; most of them are trained in Sweden. The English teachers have a structure, a way to get to the point, but modern languages are just so emotional.

(Deputy-Principal, Stoneville)

I attended two general staff meetings at Stoneville; these take place every Monday morning at 8:00 in the communal staff room. The structure of both meetings was very similar. The Principal, standing next to the Deputy-Principal, listed the main events and tasks of the week ahead and called on individual members of staff

(teaching staff were sitting facing the managers) to expand on certain points (for example, how to update the intranet pages, or the procedures to follow to organise school trips). Topics related to student well-being were also discussed, and teachers were given specific instructions about how to cope with certain situations. (For example, the case of one female student wanting to be called by a male name was highlighted, with instructions about how to remember to use this name, and to prevent other students from mocking or harassing the student). Throughout both meetings, instructions were given, but members of staff were not invited to share views and experiences, or to engage in further discussions. Stoneville's Deputy-Principal, quoted above, seems to regard this lack of participative engagement at the school as functional and part of the school's drive to be efficient.

6.4 School models for different student populations

At both schools, being educated in English is constructed as a private investment of families and students who want to join an international elite:

There is a question of challenging identities if we talk about internationalisation... our students probably have more in common with students of the same social class in another European country or the States than with students from the suburbs in Stockholm... I think we should look at identity as post-national, and this is the reason why we teach them in English.
(Lars, Parkview)

There is also another huge problem... segregation. There is a huge gap between town and suburbs... the suburb kids won't ever catch up... it is because of the parents, the social classes... in the suburb there is no investment, there is no work, there is depression and madness. What is the school doing for this? Our kids here are escaping the suburbs by coming to this school and hopefully studying abroad.
(Alex, Stoneville)

These quotes relate to the notion of 'return-thinking', analysed in Sweden in a number of research projects over the past 15 years (Beach 1999; Dovemark, 2004; Beach and Dovemark, 2007, 2009 and 2011). This notion captures a shift in students' approach to education in terms of 'a culture of self-interest' (Ball, 2006:82) in which students and families opt for the form of education that can better suit their future plans. According to Harvey, the choice system in education attends specific class interests (Harvey, 2006). Beach and Dovemark (2011) identify in current constructions of the ideal student in Swedish schools (as interested in school work and succeeding internationally) characteristics peculiarly typical of the Swedish middle-class flowing from the 'small-democracy' mentality discussed in Chapter 4.

Despite the common interest in international placements and success, the way students' subject positions are constructed in the two schools is clearly different. Whilst the active agency of students is emphasised at Parkview, the mixed-background students at Stoneville are defined as either achievers or non-achievers depending on their adherence to regulations and codes of behaviour, or 'the hidden curriculum'. This is important, as new policy discourses which privilege performance in tests and competition between schools can, as Louise Archer (2008) points out, produce new and increasingly subtle forms of racism. At a superficial level, new hierarchies are based on performance (closing down the Science B programme is an example of this). However, an analysis of teacher discourse shows that alongside these hierarchies of attainment is a hierarchy of identities in which students are constructed as more or less ideal and valuable ('we have the top families', Parkview; 'the achievers are disciplined', Stoneville).

Niia et al. (2011) studied the relationship between student participation, parental involvement, and academic achievement in Sweden. According to their results, students and teachers construct participation rather differently from one another. Whilst for teachers this corresponds to active engagement in class aimed at enhancing academic performance, for students participation is constructed in terms of ability to socialise and interact with peers. In the Swedish context, where students' active participation in class is highly valued, the authors suggest this mismatch in expectations and understandings may result in the exclusion of students who are less socially capable or hold a different cultural construction of class participation (Niia et al., 2015). In this respect, a final aspect of traditional Swedish education heavily criticised by Stoneville's staff is its supposed closure to other cultures, reinforced by the 2012 school inspection (analysed in the next chapter) which was thought to have excluded and prevented the full participation of those students who did not speak Swedish. In interviews, Stoneville teachers reflect on how, in their view, contemporary Swedish society needs a model of education that is geared up to tackle problems quite different to those seen in previous generations, including the integration of different cultures:

At the end of the third year our students learn how to perform well in an academic environment but not just that... they have to be able to work with other students as you do in a university, group work things like that, and also to be friendly to people and to be able to recognise that there are also people from other cultures... you know people from other cultures exist! What makes me mad about this country is that there is no understanding or willingness to understand that kids with parents from different backgrounds and countries do things differently. And differently doesn't mean wrong!
(Alex, Stoneville)

In emphasising the differences between the international/English ethos of the school and the Swedish system, Alex draws attention to a mismatch between the values stated in the curriculum (recognition and tolerance) and a system that appears to marginalise students from non-Swedish backgrounds. The Deputy-Principal of Stoneville also highlights a certain rigidity of the Swedish system in terms of the acceptance shown to students from other backgrounds, and claims this is reflected in the 'Swedishness' of the inspection system, which will be analysed in the next chapter:

And the inspections... do they really support us in this sense? I think they look at the school from a Swedish perspective, and in Sweden if something is different it is also difficult to understand. With the inspection there is a bit of this going on. (Deputy-Principal, Stoneville)

The quotes above highlight that, while Stoneville emphasises in its marketing materials an instrumental conceptualisation of internationalisation (focused on providing students with access to advantageous international opportunities), it embodies a different aspect of internationalisation too. While this does not quite constitute a critical, multicultural curriculum, it does promote the idea of care and recognition of a plurality of backgrounds, which is apparently absent from mainstream Swedish schools. Teachers at Stoneville point out the discrepancy between a model of Swedish education they consider to be suitable only for a specific student population, and the demands and challenges of contemporary society, higher education and employment markets.

Such concerns about the closed nature of the Swedish system are expressed by Parkview staff as well. For example, Lars displays awareness of working in a school tailored to the demands of a specific population rather than being accessible to all:

The model of this school would not work in a suburb; we would have to change the pedagogy and the focus in a suburb. In one way we should offer the same education, but in another we should always look at what sort of students we have and make the teaching suitable for every individual. Here we work with students who share certain beliefs. But the Swedish system is being challenged, for example we have a lot more immigrants than other countries with parents that are not academic and this influences the general results in Swedish schools... students would not follow us in the suburbs. (Lars, Parkview)

Lars's statement shows that Parkview staff are aware that the school is targeting itself at a very specific niche audience, one inspired by a traditional ideal of Swedish education (as set out in the 1969 and 1980 curricula). However, Lars also highlights some inadequacies of the traditional democratic Swedish model for the current

multi-ethnic Swedish society. By doing so he implicitly suggests that the education system can no longer be considered comprehensive and, indeed, is failing in its purpose (as expressed in Chapter 5) to integrate students from different backgrounds and prepare them to cooperate in a multi-ethnic society (Boman, 2006). However, rather than considering the school system resulting from the Voucher Reform as intrinsically discriminating, students from non-Swedish backgrounds are positioned within a deficit discourse as not fit to take part in the traditional Swedish education model based on inclusion and shared-decision making.

These quotes shed light on some of the contradictions inherent in the 'freedom of choice' model of education introduced by recent reforms. Stoneville's marketing strategy is implicitly predicated on the idea that the traditional Swedish model is not suitable, as well as not welcoming for, students from different backgrounds, and the school presents itself as the only valid alternative to the system. At the same time, Lars seems to reinforce the idea that different student populations require different forms of education. These quotes highlight the potential limits of a school market based on free choice. Such limits have been confirmed by *Skolverket* reports (1996 and 2003) and other national studies by Daun (2003), Arnman et al. (2004), Böhlmark and Lindahl (2007), and Bunar and Kallstenius (2007). These reports and documents highlight the difficult process of integration (or lack of it) of ethnic minority students in Swedish schools, and the fact that for the most part these students tend to remain in their suburbs and local schools. The conceptualisation of students as active choosers in the education market is questioned, as Goldrick-Rab (2006) suggests in the context of college students. Goldrick-Rab's study highlights the differences between those students for whom choice is real and those whose choices are forced upon them. Although this research focuses on upper-secondary school, the limits of choice policies seem also to be apparent in the Swedish case.

In short, Parkview and Stoneville seem to belong to different education traditions directed at students from very different backgrounds (Bowles and Gintis, 1976) perhaps echoing the distinction Rose (1989:182) drew between two kinds of schooling in the UK:

One directed at the child of the well-to-do, the other at the child of the working class. The former has sought, by and large, to maximise the potential of the adult that the child will become [...]. The latter has sought, in different ways, to minimise the threat to social well-being that the future adult might represent.

In this context, freedom of choice reinforces and consolidates such differences instead of challenging them.

6.6 Conclusions

This chapter provided a description of the two case study schools, introduced their organisational practices, and highlighted how their identities are fashioned into branding strategies to attract and meet the requirements of supposedly different student populations. In terms of internationalisation, the chapter showed that the two schools move between different identities, on the one hand focusing on the instrumental value for students of being educated in English, and on the other highlighting the importance of a school setting in which differences are recognised and international and cross-curricular projects shape all-rounded individuals. As the analysis of extracts from the Swedish curriculum in Chapter 5 suggested, a supposed loss of cultural identity conceptualised as ‘belonging’ to a specific tradition is constructed as a problem that schools are charged with resolving. Education is invested with the responsibility to resist the dilution of cultural and social traditions and norms (Biesta, 2003).

The two case study schools, however, do not engage in a critical reflection on multiculturalism. Stoneville recognises the diverse backgrounds of its students but aims to regiment them in the name of academic standards. Lars at Parkview even constructs immigrant students as in some way deficient and unable to fit into the Swedish democratic education system. Parkview’s progressive pedagogy seems in this respect to serve a branding strategy more than a genuine interest in the politics of recognition and integration; the cross-cultural pedagogy seems to be advocated only for one particular type of student and for their individual betterment, therefore missing what Boman (2006) defines as the promise of education, in other words the possibility to engage in deep social change.

While students’ identities are constructed differently at each school, at both Parkview and Stoneville students are attracted to an education in English, as this opens the door to international opportunities. Student identities (constructed as achievers at Stoneville or independent and engaged thinkers at Parkview) are emphasised in terms of the ‘ideal learner’ (Youdell, 2006:189).

In setting themselves up in opposition to the traditional Swedish model, teachers at Stoneville criticise the lack of content in the Swedish curriculum. They seem to

identify in this flexible model an 'epistemology of absent knowledge' (de Sousa Santos, 2001), which inevitably discriminates against students from non-Swedish backgrounds. Stoneville teachers suggest that only their regimented training and conception of education can bring to the curriculum a more solid 'voice of knowledge' (Young, 2009) that ensures Swedish education is inclusive of students from other backgrounds. Teachers at Parkview, however, see in that same flexibility an opportunity to enhance their professional expertise by defining content based on their knowledge and on student needs. In this case, the discourse of equivalent education is bound to a history of prior discourses (pre-1990s constructions of equivalence), 'a cemetery of past truths' (Veyne, 2010:39), which makes it possible, at least in certain respects, to think about teaching and learning in different ways.

It is evident from this discussion that equivalence, in the context of policy and practice (Ball, 1993:20), allows a degree of negotiation and flexibility that leads to very different cultural outcomes at each school. But policies are also discourses:

we do not 'know' what we say, we 'are' what we say and do. In these terms we are spoken by policies, we take up the positions constructed for us within policies. [...] Drawing on Foucault, we see policy as unfolding not through large scale events, gestures and interventions, but, rather, through a complex micro-physics.

(Ball, Maguire and Brown, 2012:138)

This perspective is confirmed by the two case studies, which show how the interplay of policies concerning choice, regulation of teacher employment, school inspections and internationalisation lead each school to construct mixed, client-oriented identities.

In Bernstein's terms, Parkview presents a prospective pedagogic identity, formed by 'selective recontextualising features of the past to defend or raise economic performance' (Bernstein, 2000:67). The school's focus on cross-curricular education and cooperation with external institutions (outlined in Chapter 5), combined with traditional elements of Swedish education and a focus on academic prestige are all aspects of such an identity. Stoneville in contrast presents a de-centred pedagogical identity, in which

the pedagogic practice will be contingent on the market in which the identity is to be enacted. The management system here is explicitly hierarchical [...]. The transmission here views knowledge as money. [...] Here the identity of staff and students are likely to be formed less through mechanisms of introjections but far more through mechanisms of projection. That identity is a reflection of external contingencies.

(Bernstein, 2000:69-70)

These two school identities both find *raison d'être* in the context of policies of equivalence and steering by objectives. The broad spectrum of education ideas allowed by equivalence seems in this respect to undermine the principle of a common framework of education for all which had characterised Swedish schooling up to the Voucher Reform in the 1990s. It appears to open up a differentiation shaped by marketing plans, and student and family backgrounds and expectations, and reflecting purely instrumental needs. This is a 'technology of performance' that transforms students, teaching staff and institutions into agents of policy and creates new relationships 'between the aspirations of authorities and the activities of individuals and groups' (Rose and Miller, 1992:173).

One particularly interesting finding from this research is that teachers in the case study schools do not seem to challenge the reform itself, or identify it as the main reason for a lack of inclusion of students of different backgrounds. Rather they focus on the specific realities of their individual schools and on the fitness of their specific school model to meet the needs of student populations defined as different (in contrast to the 'school in the suburbs'). This is perhaps one illustration of the individualisation of teaching that will be discussed in Chapter 9. Working increasingly alone, teachers seem to have lost a focus on the structural causes of education inequality in Sweden. As a result, they tend to identify the problem as one of students not fitting the model rather than considering that it may be the model itself, one of school differentiation, that is intrinsically problematic and ultimately discriminating.

Chapter 7

Managerial flexibility and quality assurance

7.1 Introduction

It has been observed in Chapter 4 that in recent policy documents (the 2011 Curriculum, and *Skolverket* reports from 1996 to 2006) equivalence is constructed both as a synonym for steering by objectives but also as a principle leaving flexibility to individual schools to choose their preferred organisational style and approach to education. At the same time, in the same policy documents, the term has been linked to quality assurance mechanisms, such as student assessment, school inspections and stricter regulation of staff employment. This chapter aims to explore how the case study schools relate to this dual aspect of equivalent education.

The first part of the chapter will consider how the for-profit interests of the companies running the schools influence the contrasting education models offered by Parkview and Stoneville. The chapter will then go on to consider how the management task at both schools is constructed as setting the framework for school-work in relation to company goals, and how teachers tend to have limited voice in decision-making. Both these sections aim to show how different managerial models can coexist within equivalence and the steering by objectives philosophy. Finally, the topic of school inspections will be introduced in order to highlight how schools relate to central quality assurance measures. In doing so, potential tensions and contradictions between the flexible models of schooling equivalence allows and the regulations set by inspections will be highlighted.

7.2 Parkview: organization's interest vs. teachers' interest

The combination of a traditional Swedish education approach, use of personalised IT solutions and high-standard teaching are emphasised in Parkview's marketing materials. Teachers seem to be well aware of their role within the organisation as they move confidently between a corporate discourse, in which they identify themselves as part of and of value to the school, and a professional education discourse in which they focus on the crucial importance of their autonomy:

I have a lot freedom in this school and this is something I really like, as a lot of private schools in Sweden have this idea that teachers should follow the same pedagogical model. Here I think the management have

trust in the teachers, and in that way it's quite traditional in a good way,
and the organisation benefits from us. (Lars, Parkview)

If I don't have a meeting or a class I don't have to be here, this is pretty
awesome... as long as I work well with the kids, they are happy.
(Michael, Parkview)

At Parkview, the professional specialisms of teachers are given great prominence in school marketing materials; teachers are positioned as a key element in the school's branding strategy and are used to attract a select student population.

While most of Parkview's teachers seem to appreciate the freedom they are granted, tensions are evident between the teaching body and Parkview's management team over professional development, revealing a broader clash between the professional values of teachers and the business-oriented values of the organisation:

They want us to study more and more and be qualified in Sweden and abroad. To send us back to school they get a certain amount of money from the state... and they are supposed to give you time off but they keep the money and your workload doesn't change... the organisation is keeping the money. They are making money out of it.... and I think it's quite scary... but the good thing is that in class we are free.
(Jill, Parkview)

Jill's quote suggests that the for-profit nature of the organisation leads to the relegation of teachers' interests and concerns in favour of organisational goals of efficiency and brand promotion. (As outlined in Chapter 6, Parkview's parents attach great importance to teachers being qualified within the Swedish system and the school markets itself as belonging to the Swedish tradition). While good teachers are central to Parkview's distinctiveness and market value, their influence on management is restricted to classroom practice and pedagogical project design. Principals and managers are primarily responsible for school success, defined as high numbers of students achieving strong results and a commanding position for the school in national league tables. Principals and managers set the framework and working conditions in which teachers operate, with classroom staff largely excluded from decision-making.

A review of the literature on Anglo-Saxon countries suggests that a strong managerial approach to the running of a school is counterproductive in terms of student learning (e.g. Smyth and Shacklock, 1998; Apple and Beane, 1995; Mahony and Hextall, 2000; Gewirtz, 2002). For example, Harris and Lambert (2003) have argued that teachers' full participation and engagement are crucial in order to carry

out changes and improvements in school practices. This argument has also been used to promote professional autonomy in terms of shared leadership where problems of learning are solved locally by teachers and their school communities (Watkins et al., 2007). Some of these tensions also emerge from observation of Parkview, as the example of e-learning, discussed below, will illustrate.

7.2.1 Parkview, management and IT

Although teachers at Parkview tend to detach themselves from 'the organisation' and focus on their courses and students, the language of business is still evident in their interviews, in particular in relation to IT solutions and the IT profile of the school. As highlighted above, students at Parkview are each provided with a laptop by the school, and premises are designed for laptop work in classrooms and study areas. Students are also in charge of running an IT helpdesk for their peers. The crucial role that IT plays in pedagogy is consistently highlighted in marketing materials as one of the key aspects of the school's cutting-edge approach. However, members of staff seem to be very critical of such approaches, which are perceived as being forced on them by managers rather than negotiated with reference to real needs and benefits. Some teachers at Parkview clearly regard the extensive use of e-learning as a temporary 'fad' rather than an approach with a sound pedagogical basis:

We have been through a lot of internet systems and they don't work, or haven't been finished or don't work on a Mac computer. Right now we have three different places to go for information; you always feel you are missing something. But sure, we HAVE to buy them.

(Michael, Parkview)

There is a faith in computers and everything is about 'e-this', 'e-that'... I hope they understand computers are tools and we teachers are the core of education.

(Lars, Parkview)

Computers, operational systems and e-platforms are provided to the school by a company owned by one of the members of the advisory board that specialises in IT solutions and software. This is seen by some teachers as interference with their professional choices: 'we have to buy these products, but we do not need them... and we waste so much time making students use them as they [the organisation] want us to use them' (Peter, Parkview). While subject teachers are sceptical, school managers see great potential in the use of computers, partly to promote a more dynamic learning environment and partly as IT solutions are regarded as cost effective: 'we do not need a library now. We are in central Stockholm we have the

royal library and the municipal library less than 10 minutes from here, students have their laptops and they can just go there' (Deputy-Principal, Parkview). However, this central tenet of Parkview's philosophy is problematised in the school's inspection report (see Chapter 9 for further discussion), which considers the lack of a library to be a shortfall: 'the inspection shows that students do not have access to a school library. The Principal is required to repair this lack as per 2 Ch. § of Education Act' (2012:6).

So while Parkview advertises itself in marketing materials as one of the most innovative schools in terms of integration of IT resources, it seems, at least in part, to be influenced in such pedagogical choices by the private commercial interests of one of its board members and by financial concerns. The views of teachers are not taken into account in decision making concerning a key education tool and its expected benefits; neither are teachers encouraged to develop a coherent pedagogical model employing these tools. Teachers, who as supposedly autonomous and talented professionals are the second key selling point of the school, demonstrate resistance to and scepticism towards the pedagogical and practical value of such resources. Finally, while the school inspectorate praises Parkview in its report for a positive atmosphere, curriculum integration and excellent results, it highlights two critical weaknesses. Interestingly, these are the two very same things the school highlights as strengths: extensive use of computer solutions and teacher autonomy (as will be shown in Chapter 8).

From the analysis of interviews, observations, marketing materials, steering documents and the 2012 inspection report it appears that 'the organisation', Parkview, interferes as little as possible with teaching practice that takes place within the framework set by management. Teachers are employed for their prestigious profile and trusted to be able to deliver good grades and appeal to a privileged student population. The discourse on equivalence constructed by Parkview is centred on the original interpretation of the term from the early 1980s: respect for individual students and autonomy for highly qualified and high-status teachers. Along with extensive use of IT resources and a traditional idea of Swedish education, these elements are emphasised in marketing materials with the aim of attracting the Stockholm liberal, upper-middle class. Marketing materials portray a very homogeneous student population in terms of ethnic background (in other words white students). They also emphasise the relationship of the school with some of the leading institutions of Swedish cultural life, the prestigious families represented

on the Board, and the location of the school in the heart of Stockholm with students living in this area.

The coexistence of these twin discourses, a professional one focusing on high academic standards and a commercial one focused on costs and effective management is hinted at in the opening page of the inspection report:

The school is characterised by a safe and motivating environment, where students thrive and appreciate being listened to and nourished by the staff. The average students' performance is above the average national score, with the exception of maths. Students enjoy individual attention, the constructive and creative atmosphere and the opportunity to join mixed-programme classes. [...] Large use of questionnaires is made to monitor students' and families' appreciation of the school and to reformulate goals accordingly. (Skolispektionen, 2012:1)

The client-oriented nature of the school is evident in the quote, as students and families have the power to influence school goals by expressing their views and preferences and by putting pressure on managers and the organisation to 'reformulate goals accordingly'.

7.3 Stoneville, entrepreneurial success and the management-teacher relationship

In contrast to teachers at Parkview, Stoneville teachers appear to have internalised the language of competition and business that runs like a golden thread through all school marketing materials from the website to brochures and posters. In these materials, success, international competition and drive are key words. Teachers also tend to conceptualise the current and future success of the school in terms of numbers and quantifiable results:

I have been working for this company since 2003 when it [this school] was opened. At the time there were only two schools but then every year or second year the number of schools grew. [...] In the past ten years we sort of came out of nowhere and we are now competing against the top three Stockholm schools. (John, Stoneville)

The company that owns Stoneville is considering establishing more new upper-secondary schools in the municipality of Stockholm, and teachers demonstrate awareness that such plans are first and foremost driven by profits:

Lots of schools are having to close... but we are doing extremely well. I think the company wants to expand... but it is a very competitive market and opening another *gymnasium* school in direct competition with yourself is maybe not the greatest idea. We are doing extremely well in terms of numbers. (Marta, Stoneville)

For the most part, teachers construct the success and achievements of the school in terms of student numbers and results and, in contrast to Parkview, the school's profits and business plans are shared and openly discussed as relevant to teachers and a measure of their own success.

At Parkview, teachers seem to be conscious of their value to the organisation as a key marketing asset ('the organisation benefits from us', Lars), however they maintain a certain level of detachment from and scepticism towards the market mechanisms affecting their employer (as was illustrated in the case of IT, above). Teachers at Stoneville, in contrast, seem to much more fully embrace the company's goals and strategic plans (in terms of profit-making), and emphasise the 'prestige' of their role rather less. Most of the teachers interviewed at Stoneville express the desire to move into a managerial position after gaining some teaching experience, positioning teaching as a transitory step in their careers. They embody a performance-orientated discourse of career progression and achievement that empowers and motivates them to develop their professional life beyond teaching. Their professional identity is not focused on academic or pedagogical expertise, but on outcomes and institutional self-interest (Ball, 2003:218).

School visits to Stoneville revealed a very different scenario to that at Parkview. At Stoneville, teachers are in charge of organising extra-curricular activities and fairs, which attract representatives from US and British universities to brief students on entry requirements. 'We had this university fair last week, it went really well, it is good... you know, when students understand they have to work hard and not mess about in order to get where they want' (Alex, Stoneville).

Staff also organise a variety of sports tournaments:

We receive extra funding for sports. Houses have internal competitions and they take it very seriously. And parents are happy... no complaints there. If you make a choice to come here, we expect you to work hard. There is no secret. And the competition... well the world is changing if you have to compete against someone from China or Brazil well... let's be honest... they have to be ready. (Alex, Stoneville)

Alex's quote is worth analysing for two reasons, which both illustrate a sharp contrast between Parkview and Stoneville. At Stoneville, student activities are staff-led; there are no initiatives such as the Parkview student-led IT help-desk, student-organised clubs or the Friday performances. Every aspect of student life is tightly organised within a competitive framework, which teachers identify with and embrace

fully. In addition, Stoneville teachers do not question or problematise the profit-making strategies of their employer. While at Parkview Jill expressed her concern about the foundation making a profit out of teachers' continuous professional training, at Stoneville, Alex does not question the fact that sports competitions are used by the company to apply for extra funding. Both Parkview and Stoneville benefit from the funding system allowing schools to receive additional finance by making the most of their specific specialisms. However, while Parkview teachers detach themselves from this practice, Stoneville teachers appear to support it.

The school organisation at Stoneville also offers a number of mid-level management positions and a career path that is considered very appealing to teachers. As is the case for Parkview though, the senior management team of the company is solely responsible for decisions about working conditions, marking a clear distinction between teaching and influential managerial roles.

Interviews show that the majority of Stoneville teachers identify their goals with the goals of the company. Nevertheless tensions are evident in some cases:

I feel valued by my colleagues; it is hard to say in terms of management as we have a new principal. But I don't think people feel much valued in terms of the company... There is a reasonable turn over year after year... and it seems to be a company policy that if people make demands... 'off you go' and bring in some new ones.

(Stephanie, Stoneville)

This is one of the rare cases in Stoneville interviews in which the pronoun 'we' is replaced by 'I' and 'they'. Stephanie's quote shows that the school is not particularly concerned with nourishing and developing staff autonomy, as is the case at Parkview in relation to pedagogy and expertise. Ultimately, at Stoneville, teaching staff are not considered central to the success of the company in the same way as at Parkview. Teacher profiles and pedagogical projects do not feature on the website, *verksamhetsplan* or in summary marketing reports available on-line.

Stoneville and Parkview seem to adhere to different leadership models. While Parkview adopts what Ball (1987) refers to as an 'interpersonal leadership' style, Stoneville has a strongly managerial approach.

For the manager, the control is achieved by the channelling and formalising of talk into a structure of committees and working parties. The only valid access to voice is through this structure. The structure itself creates hierarchy and limits the time for subordinate participation and the manager's control of agendas and the timing of discussions provides a further source of veto over the content of the talk. In Gans's

(1967) terms, the formal structure of committees provides a 'script' for decision-making 'performances'.

In the case of the interpersonal style, control is achieved by the symbolic mobilisation of support; the emphasis is upon commitment and persuasion; the personal and informal chat is the primary vehicle to talk. Grievances and personal troubles are addressed in this way and the informal channels are treated as valid and open to all – the aim being to tie subordinates into personal relationship with the leader.

(Ball, 1987:125)

The group identity and clear structure at Stoneville work against the more individually negotiated approach to leadership seen at Parkview. However, in both cases, to a greater or lesser extent, teacher participation is reduced to an appearance; there is little evidence of teacher involvement in 'actual' decision-making. This appearance of participation, pseudo-participation, is highlighted in particular by the concept of 'consultation'. In Lukes' (1977, cited in Ball, 1987) terms, such 'rights of participation' are merely a political 'ritual' that lends support to what is in reality a system of autocracy, by bestowing spurious legitimacy upon it.

Saunders (1981, see Ball, 1987) categorises three major types of 'non-decision making', which we can link to the schools: 'negative decision-making' where, as in the case of the IT solutions discussed above, the needs of staff are simply overlooked; 'anticipated reactions' where (as suggested by Stephanie's quote) teachers seem to be afraid to challenge management on some topics so they do not bring them up; and 'mobilisation of bias', where debate takes place and tensions are relieved, but crucial issues do not emerge. As Saunders points out, the very possibility of debate over certain issues is constrained by existing beliefs and values. Again this is clear in relation to Stoneville, where the fact that the school makes a profit out of the sport tournaments is not even perceived as potentially problematic.

As the steering by objectives model introduced a greater degree of complexity into school life, there has been a greater need for a specialised cadre of trained education managers. With this development it has become increasingly difficult for ordinary teachers to contribute to the process of school government. In other words, as the examples of these schools suggest, management has become a powerful mechanism of exclusion (Ball, 1987).

Another aspect of school complexity will be illustrated below, through the example of Stoneville, in relation to inspections.

7.4 Quality assurance: potential tensions within equivalent education

Stoneville's school documents and marketing materials highlight the good performance of the school in terms of grades, the school ethos based on mutual respect, and the English speaking staff.

In addition to its results, and its 'English' approach to education (emphasising discipline and respect), Stoneville's reputation is built on its location in south-central Stockholm. The importance of school location comes up quite often in interviews with Stoneville teachers. The majority of students attending the school do not live in central Stockholm (the suburbs in Stockholm are highly segregated). The school positions itself as providing 'access' to central Stockholm as a crucial element of its value proposition:

I would say this [our success] is obviously because people want to study in English [...] but again the structure aspect is perceived to be a very good thing and of course... well there are two more things: one is that we are in the middle of Stockholm and the last thing is that we have the house system.
(John, Stoneville)

The school's structure and results are emphasised in its 2012 *Skolinspektionen* report, which says: 'the school activity is characterised by good structure and order and mutual respect between students and teachers. [...] The eligibility of students for university at the end of the third year is 94%, considerably above the national average' (*Skolinspektionen B*, 2012:4). However the same inspection report draws attention to two aspects of the school which are considered 'in need of further action and measures' (*Skolinspektionen B*, 2012:1): the lack of student participation and influence in school life; and the inconsistent support offered to students in need of extra help.

The hierarchical and strictly structured nature of the school seems to clash with some of the founding values of Swedish education, such as student democracy and participation (1994 and 2011 curricula), which remain benchmarks of the inspection system. Stoneville's ex-Principal, who resigned from her position in January 2013, argued that the conclusions of the *Skolinspektionen* were shaped by political considerations and overlooked the good results and fundamental intentions of the school. These intentions were to give students from different backgrounds, who might not easily fit into a Swedish school, the opportunity to receive a high-quality academic education and be accepted into prestigious international universities. Commenting on the democracy point, Lukas, one of the teachers interviewed,

posed the question: 'how can we work with democracy when we have 30 students in class? Democracy is also a question of class size and we squeeze as many students as possible in... This is for economic reasons of course'. This quote suggests that a combination of offering an alternative to the Swedish system as a branding device, and economic concerns, is a key factor that influences school setting and organisation.

When asked about the measures the school was undertaking to respond to the report's findings, the current Deputy-Principal pointed out the establishment of a student board, 'that mostly organises ski trips and parties, they collect the money', and the setting up of a specific procedure for students to report concerns and complaints, 'they have to know whom to contact, otherwise it is a mess. So we have a procedure, we listen to them but they must go for the right channel'. The school, then, reacted to the inspection findings and recommendations not by questioning the inspectorate's approach or their school identity, but by finding solutions in line with their particular interpretation of equivalent education. A similar approach is taken at Parkview in relation to its report, as will be shown in Chapter 8.

While at Parkview the rationales for its extensive use of IT resources are that IT both facilitates an innovative pedagogy and helps to maximise profits, at Stoneville a hierarchical and teacher-centred approach to education is justified in terms of a rigorous academic approach and because it helps deliver a more cost-effective student-teacher ratio.

At Stoneville, cost-effectiveness and the drive for results seem to be connected to the second critical finding identified by the inspection team:

Specific support is not given to the extent and in the manner the students need and are entitled to. (Skolinspektionen B, 2012:5)

In Stoneville's *verksamhetsplan* as well as on the school's promotional on-line pages, the 'Wellbeing Team' is consistently highlighted. As explained in Chapters 5 and 6, the team offers individualised support to students assessed with learning difficulties, including special classes and additional exam preparation sessions. Despite the attention given to the Wellbeing Team in these school documents, the inspection revealed that not all students are given the support they require. Once again, cost-effectiveness and a focus on maintaining the reputation of a high-achieving school are chief among the reasons for this. In an interview in November

2012, a few months after the inspection, the ex Deputy-Principal explains why the school is not investing in students with learning difficulties:

We must discourage them from joining the schools... students who are not achievers, who take lots of time and energy from us and will never get the grades we need to be at the top of Stockholm league. We can't afford to keep them. (ex Deputy-Principal, Stoneville)

In the face of criticisms in the inspection report that not all students are supported according to their needs, the school's response is to discourage students perceived as of lower ability from joining as the school cannot afford to do otherwise. Attracting the 'right' students and demonstrating the added value of the school in terms of securing access to prestigious universities is key to the school success: 'Only last year two of our kids were accepted at Imperial College in London... coming from southern suburbs in Stockholm, that's quite an achievement!' (Alex, Stoneville).

As this discussion shows, students are positioned as a 'commodity' at Stoneville. Only by attracting the 'right', academically focused, student population can the school reinforce its prestige and reputation among its Stockholm competitors and reach the highest ranks of the school league tables. Nevertheless the quotes presented in this section also suggest that there seems to be tension between the flexibility of school models that equivalence entails and at the same time, the system of inspections aimed at guaranteeing that all schools comply with the requirements of equivalent education itself.

A further reflection on inspections is helpful here, as it will help frame data that will be analysed in the following two chapters and highlight potential contradictions in the implementation of equivalence policies.

7.5 The Swedish inspection system

A new inspection system was implemented in Sweden in 2008, when *Skolinspektionen* (The School Inspectorate) was founded. The system was introduced to tackle what was perceived to be inadequate state participation in maintaining and improving nationwide education quality and equivalence. This change followed a lively public debate about the lack of central control over independent schools and falling standards in Swedish education. This debate led to the Education Act of 2010 (see Chapter 4). Along with other both 'softer' and 'harder' accountability mechanisms (Lawn, 2006, see Rönnerberg, 2014), including

school self-evaluation, inspection became a central instrument to monitor the implementation and impact of policies focused on results.

Skolinspektionen has played a key role in relation to 'governing knowledge' (Ozga, 2008; Lindgren, 2015). Its task has been to generate and analyse data and knowledge to support the development of an effective national education system that can compete in international league tables (Ozga, 2009; Rönnerberg, 2014; Lindgren, Hult, Segerholm and Rönnerberg, 2012; Lindgren, 2015). *Skolverket* and *Skolinspektionen* represent 'tools of government' (Howlett et al., 2006:130, see Helgøy and Homme, 2006), by that meaning instruments and procedures that put new policies into practice (Rönnerberg, 2014). Inspection reports serve a dual purpose: they provide knowledge about one school's work, while at the same time they are grounded in particular assumptions about what constitutes good practice and how inspections should be carried out (Lindgren, 2015). Inspection reports are crucial for schools' reputations and branding success (Boyne, 2006 and Clarke, 2008; Lindgren, 2015).

In Sweden, the role of the central state in the post-reform education system was debated and outlined in a number of governmental reports and bills prior the 2010 Education Act (Government Development Plan 2001/02:118; Government Bill 2002/03:1; Parliamentary Standing Committee on Education 2002/03 UbU3; Parliamentary Standing Committee on Education 2002/03 UbU1 - analysed in Rönnerberg, 2014). The inspection system resulting from such policies and debates focused on the achievement of particular standards, as well as legal requirements (Lindgren et al., 2012). However, these standards do not take into account the specific circumstances and structural context of individual institutions, such as socio-economic factors (Lindgren, 2015).

A 2012 study of inspection in Swedish elderly care institutions by Ek is instructive here, despite the different context, as it shades light on inspectors' decision-making and data collection processes, as well as the difficulties they face in carrying out 'correct assessment' and achieving full 'auditability' (Ek, 2012, see Lindgren, 2015). Inspectors tend to construct the 'object' of inspection on the basis of benchmarks that do not reflect and take account of the specific situation of the schools/institutions observed.

A 'deficiency' identified via a school inspection needs to be understood in this context (Lindgren, 2015). Deficiencies are constructed by the inspection process, which reflects and creates certain expectations of good schooling, efficiency and

improvement. Linguistically, it has been shown that Swedish inspectors have coined a new and specific jargon and vocabulary to express deficiency. As Lindgren (2015) observes, the Swedish neologism *att brista* [the act of making a deficiency] is generally used by *Skolinspektionen*, underscoring that it is indeed the inspectors who 'make the deficiency', rather than teachers or schools. Clearly, valid justifications need to be found to do so. In the case of Stoneville, the fact that English 'is not contemplated', as shown below, suggests that some fairly rigid criteria are in fact in play.

7.5.1 The inspection system and the example of Stoneville

An analysis of the language used by staff members at Stoneville in interviews reveals that the pronoun 'we' is used 356 times, in contrast to the 42 times it appears in interviews with Parkview teachers. Stoneville teachers perceive and construct themselves as active participants in 'the company' by interiorising the language of business and identifying themselves with its values.

On average Stoneville's teachers are younger and less qualified than their Parkview colleagues. Despite their diverse backgrounds and cultures, the consistent use of 'we' shows a stronger group identity compared to Parkview. This can at least in part be explained by the fact that Stoneville teachers identify themselves as 'non-Swedish' and the company offers them a common ground of identification and belonging.

The *Skolinspektionen* report of 2012, and more precisely the reactions it triggered, helps to shed some light on this issue:

For a number of courses and subjects teachers lack the right [read Swedish] qualification to teach. (Skolinspektionen B, 2012:2)

At Stoneville, the lack of qualified teachers was commented on by the Deputy-Principal and an English teacher:

The problem is that our teachers do not show up in the statistics as they are qualified abroad. Of course they are qualified but not in this country. So we have a really bad rate when you look at state statistics or inspection reports. They don't appear... that's very bad, very sad. I think if you teach modern languages you need to have the Swedish qualification. But no... we just appear that our staff are not good enough! (Deputy-Principal, Stoneville)

The inspectors complained because we didn't speak Swedish and that was ridiculous. They knew they were coming to an international school and they refused to interview the kids whose only language is English,

what a loss! ... In the report they mentioned it as a criticism as this is not contemplated... to speak English... but it is basically a criticism of them!

(Stephanie, Stoneville)

The quotes above suggest a perceived difference between Stoneville and the traditional notion of a Swedish school. It is this difference that may have a bonding effect on employees and students, at least those from a non-Swedish background, and explain the use of the pronoun 'we' and teacher identification with the goals of 'the company'. The quotes also suggest an apparent mismatch between the flexible school market in Stockholm, which allows significant differentiation between schools, and an inspection and qualification system that is not ready to recognise and value such differentiation. This point was already highlighted in Chapter 5, in relation to the apparent contradiction between a voucher reform that encouraged the opening of ethnic and faith-based schools and the claims of a curriculum based on Western values.

This lack of sensitivity to context, and the difficulty of reconciling data resulting from inspection observations and benchmark criteria, seem to be at the heart of the problem described by Stoneville staff. As yet, the consequences of the Voucher Reform and the steering by objectives curriculum, as well as the opening up of schools to internationalisation, do not appear to be reflected in the inspection system or, as will be shown in the next chapter, in the system of assessment either. While equivalence implies flexibility, other elements of the system do not appear to recognise the complexity associated with this. As Rönnerberg (2014) points out, some new research on the Swedish school inspection system is currently emerging (for instance Blomgren and Waks, 2009; Ekholm and Lindvall, 2008; Gustafsson and Myrberg, 2011; Lindgren, 2015; Rönnerberg, 2011 and 2014; Rönnerberg and Segerholm, 2011; Sahlin and Waks, 2008). However, this topic requires further study, as the re-centralisation of Swedish education policy over the past six years (following the 2010 Education Act) invests monitoring mechanisms and inspection with a specific, and crucial function (Rönnerberg, 2014).

7.6 Conclusions

The chapter focused on the growing power of management in the running of each school and in goal setting and highlighted, through the example of Stoneville, some contradictions implicit in the policies of choice and re-regulation through inspections, where different elements of the new education system seem to be at odds with one another.

The two schools construct two very distinct profiles in terms of educational and organizational models. Maintaining a leading reputation is essential for both schools, but the way this reputation is constructed and branded at each school is very different. In both cases, though, the role of management is crucial as it is managers who take the key decisions and set the framework for school work within which teachers and support staff operate. In cases of conflict, managers' decisions cannot be questioned and teachers' voices appear marginalised. This will be further analysed in Chapter 9.

The variety of school models allowed by the Voucher Reform and equivalent education is, however, not recognised by mechanisms of quality assurance that do not seem to take into account the implications of opening education up to providers from the private sector and granting them freedom in the way they run schools. Quality assurance mechanisms appear also to be based on constructions of monocultural schooling (Tornberg, 2000). The criticisms Stoneville received concerning having students and staff not speaking Swedish seems to reinforce the interpretation of internationalisation as transmitting a particular cultural tradition only. However, once more, the flexibility of equivalence as a 'term allowing space for negotiation and ambiguity' (*Skolverket*, 2003) allows schools to overcome the 'straight jacket' of quality assurance mechanisms. Both Stoneville and Parkview were inspected in the spring of 2012 and the inspections identified areas for improvement in relation to regulations set out in the 2010 School Act. These areas concern the setting of a shared action plan to support students across the school (both schools), offering students a library (Parkview), and greater opportunities for student participation in school life (Stoneville). At both schools, the areas for improvement relate closely to each school's distinctive profile: teacher autonomy in the case of Parkview (this will be analysed in Chapter 9); and student participation in the case of Stoneville. The way the schools reacted to the inspection findings reflects the flexible approach that equivalent education allows (*Skolverket*, 2003). For example, both schools set up systems to monitor and encourage forms of student involvement that do not really interfere with school philosophy and organisation, but that are sufficient to meet inspectors' requests.

The next chapter will explore another element of quality assurance policy and the complexity it implies: models and impacts of student assessment.

Chapter 8

Equivalent education and the new assessment framework

8.1 Introduction

This chapter moves on to analyse another key theme highlighted repeatedly in interviews: the new assessment framework in the context of equivalent education. The chapter will open with an analysis of the term 'quality' (based on the work of Bergh, 2011), which has been reconstructed along the same terms as 'equivalence' in education policy over the past 30 years. The analysis has been placed in this chapter to help contextualise discussions with staff, in particular concerning the impact of new assessment policies on school life (a golden thread running through the majority of interviews and school visits).

Policies are not enacted in isolation. In Sweden, the recent reform of upper-secondary education involving restrictions on teachers' employment (2011), the new curricula for teacher training and for upper-secondary education (2011), and the recasting of the notion of 'quality' (Bergh, 2011) to mean results and success in international comparisons, have all contributed to a new and more consistent focus on summative assessment. Such a trend is certainly not peculiar to Sweden. Van Thiel and Leeuw (2002) point out how monitoring and evaluation are now common throughout Europe, where the cost of assessment in the public sector has been rising dramatically. In relation to education, one explanation for this trend might be the necessity to re-establish control over a sector that had been drastically de-centralised in the 1990s (Bell and Hindmoor, 2009; Rönnberg, 2014). Another might be that international comparisons have been acquiring greater importance across different systems and the availability of data for such comparisons has facilitated a process of re-centralisation (see Ozga and Jones, 2006). Together, these changes have shifted responsibility and control back to the central state, partly via inspections (as seen in Chapter 7), but also through audits, which have become key elements of the education system (see Lawn, 2006; Rhodes, 2007; Bell and Hindmoor, 2009 and Rönnberg, 2014).

As Maguire and Ball comment in relation to the British education system, 'as part of these globalising concerns to 'fix' economic problems through producing a labour force that is 'fit for purpose' in the knowledge economy, all schools have to ensure that their standards are continually rising' (Ball and Maguire, 2012:73). The

requirement that schools reach national goals (expressed in terms of students' minimum attainment), and the marketing value attached to a school's results and its position in the league tables, are at the core of the Stockholm education market. In interviews, deputy-principals and teachers raised the topic of assessment repeatedly, and the opening paragraphs of inspection reports analysed for this project (from 2012 and 2013) clearly state the grades achieved by the schools in comparison to national averages.

Such a backdrop contributes to what Loveday (2008) calls the 'tyranny of conformity', in which equivalence comes to be interpreted primarily in terms of goal attainment.

As the policy analysis in Chapter 4 demonstrated, the notion of equivalence has been repeatedly redefined, while maintaining an unchallenged position at the heart of key policy documents. This concept has been increasingly linked to assessment and a focus on education outcomes. However the endless renegotiations of the concept haven't led to ideological or political discussions or contestations. This context creates the conditions for an apparent unquestioned consensus in favour of assessment reforms.

Assessment was central to most recent school reforms and the 2011 Curriculum, in which an A-F European grading system replaced the previous Swedish system (MVG [special distinction] – VG [distinction] – G [pass] – IG [fail]). In order to understand the impact of such changes on school identities and practices, it is crucial to explore how the two schools relate and adjust to these changes, and to what extent their approaches converge in this respect. With the advent of the new discourse of results and goal attainment, new ties between organisations and emerging processes and practices are defined as normalities, while new identities are 'materialised' within a new administration of time and space (Fairclough, 2003).

The 'logic of conformity' and 'the logic of performance' enter and impact on institutional policies and priorities, colonise interactions between teachers and their students, and shape the way in which teachers think about themselves and their work (Maguire and Ball, 2012:97). This chapter aims to shed light on how the two schools relate to the new assessment policy and to explore if their different and distinct approaches to education can be maintained within a framework of conformity in relation to grading and assessment.

8.2 The discourse on quality and assessment

Quality and quality assurance have become central concepts in Swedish education policy over the past 30 years. Bergh (2011) analyses the processes of negotiation and transformation in meaning that the concept of 'quality' went through from the 1980s to 2010. Similarly to the shifting constructions of equivalence, the concept of quality has been defined differently in policy documents over the years. In the 1980s it was used to describe a school system that embodied an all-rounded concept of education focused on developing pupils' skills, delivering a good general education to all citizens, and acting as a social equaliser (Government Bill 1988/89:100). Starting from the mid-90s emphasis gradually shifted towards an idea of quality as a set of acceptable standards, with consequent implications for teachers' roles and the role of inspection to ensure such standards were fulfilled.

Schools must provide high-quality teaching [...]. The government gives priority to the quality of education. Steps must now be taken to improve and secure the quality of education. Quality control must therefore be developed at all levels [...]. The teacher's role has become more difficult as well as more important [...]. The role of the National Agency for Education needs to be developed.

(Government's Development Plan 1996/97:112:3-5, cited in Bergh, 2011)

The focus of the Government's Development Plan (1996/97:112) cited above is on strengthening Swedish competitiveness in relation to international comparators, by emphasising monitoring and results. A few years later, the need to enhance competitiveness (Government's Development Plan 2001/02:188) was still a central feature of government policy. Yet the focus was now firmly on taking action to remedy deficiencies that could prevent goal attainment. Thus over the same period in which the meaning of the concept of equivalence shifted from respect for student individuality to goal attainment, the concept of quality went through a parallel shift from education as a means to address the needs of individuals and society, to a more restricted focus on attainment of goals and results.

Reflecting discussions in Chapter 4 of the pre-reform idea of education as citizenship apprenticeship, in the early 1990s the Government emphasised the importance of not limiting education to exposing pupils to fixed constructions of subject knowledge (Government Bill 1992/93:220). Instead, students' critical thinking, and the importance of shaping school work in a way that included also a creative and ethical dimensions of learning was at the core of school legislation

(Government Bill 1992/93:220). This was linked to new ideas about the purpose of education (*bildung*), and its role in promulgating solidaristic values:

Students must learn to change perspective. The ability to change perspective is essential in a democracy. Seeing with the eyes of others, empathising with others' situations and understanding others' arguments are all crucial to a capacity to feel solidarity. This is ultimately what the fundamental values of the curriculum are all about.
(Government's Development Plan 1996/97:112-21, cited in Bergh, 2011)

In later government documents, however, the focus shifts on building a strong education system and make Sweden a competitive country at international level:

For Sweden to be a successful country in the 21st century, world-class education and research are required, and an education system that has the capacity to see the potential in every pupil and student.
(Government Bill 2008/09:87:7, cited in Bergh, *ibid.*)

To sum up, government education texts up to the early 1990s emphasised students' all-round development through activities and a selection of topics to be negotiated locally by schools (see also the 1969 and 1980 curricula analysed in Chapter 4). From the early 2000s onwards, however, the emphasis moved towards shaping a new school system that could meet the requirements of international competitiveness and the knowledge economy. At this point, the language and arguments about teaching and teachers became more instrumental in character. While policy documents from the 1980s to the early 1990s (Government Bill 1988/89:100; Government Bill 1992/93:220) were hesitant about assessing and evaluating quality, this caution disappeared in later documents.

This shift is expressed particularly clearly in the *Regeringskansliet* of 2003 (Government's quality programme). In the Government programme, the all-round development of students is no longer mentioned, being substituted by a consistent focus on individualisation, knowledge, and quality control. The ideal school is now recast as a 'knowledge school' (Bergh, 2011):

Such a school closely monitors each student's development and has a clear dialogue with the student and the home about the results achieved at school. To succeed, schools must closely monitor, review and evaluate their own performance and their own work in relation to the objectives. The deficiency which emerges must lead to concrete action.
(Government Quality Programme, 2003:1, cited in Bergh, *ibid.*)

When the Education Act of 2010 asserts that 'equivalent education demands that in each school quality and lawful protection are guaranteed' and, that for the benefit of pupils, 'it is of the highest importance to monitor and flag up potential deficiency in

their initial stages' (Government Bill 2009/10:165:538), these arguments come to assume a status beyond challenge. Again the 'problem-solution' pattern of language construction (Hoey, 2001) highlighted in Chapter 3 is very helpful for the analysis of these texts.

Such a shift can be considered in the context of the international school improvement movement and the knowledge economy. In this policy discourse, indices of national wealth and development are closely connected to 'knowledge' (OECD, 1996; see Chapter 2 for further discussion). The knowledge economy discourse promotes numerous changes at local, regional and national level, yet it is subjected to little consistent scrutiny (Ozga and Jones, 2006). The central relevance of the knowledge economy in policy discourse appears to be close to '*topoi*' (Lindblad and Popkewitz, 2000:254): by that meaning unproblematised mottos that are considered to be inherently valid and therefore are not analysed or supported by evidence and explanation. Such slogans replace critical engagement with current problems and, at the same time, channel and influence public opinion. The expression 'knowledge economy' was employed in the EGSIE project (Education Governance and Social Inclusion and Exclusion, 2001), in order to define what was generally thought to be an important response to the challenges of new, globalised societies. 'The knowledge economy is thus a policy meta-narrative that assumes the commodification of knowledge in a system of global production, distribution and exchange' (Ozga and Jones, 2006:6). At stake for Duncan, and at the heart of this research, is 'the notion of maintaining a critical democracy through education' in this new context (Duncan, 1992:20; cited in Ball et al., 2007).

It has already been noted in Chapters 5 and 6 how the latest versions of the curriculum have adapted to the requirements of the knowledge economy by placing greater emphasis on acquired skills and an unproblematised concept of testable 'knowledge' (Sundberg and Wahlström, 2012). That said, individual course and subject descriptors do not delve into the details of the content that has to be taught, opening up the possibility for different interpretations and flexibility for individual schools. A number of quotes from teachers at both schools cited in the previous two chapters reflect this point and highlight the flexibility the new curricula allows them. Malmgren (1996) and Bergöö (2005) analysed this aspect of the 1994 and 2011 curricula, linking it to the 'steering by objectives' nature of the documents (see Hellberg, 2012). They noticed that the most recent curricula are consequently impoverished in terms of some of the dimensions of taught subjects. Discussing the

English curriculum in England, Ball et al. (1990:76) discerned four traditional paradigms for English as a school subject: 'English as Skills', 'English as the Great Literary Tradition', 'Progressive English' and 'English for self-expression'. However, the authors argue, progressively only 'English as Skills' came to be central for schools. The conditions for Swedish as a school subject in Sweden are very much the same as for English in England, such that it was possible for Malmgren (1996:87-89) to apply Ball et al.'s system to the Swedish experience with only moderate rewordings (see Bergöö, 2005:54).

It has been argued that the somewhat vague character of the most recent curricula can be explained by the strong tradition of corporatism in Sweden. In this tradition, broader, looser, agreements are favoured as they allow a wide range of interest groups of different kinds to find some common cause. This issue will be considered later on in the chapter with reference to grade descriptors. However, the 2011 Curriculum, in comparison with its predecessors, indisputably placed a greater emphasis on skills, the neo-conservative phenomenon of testable 'knowledge' (Sundberg, and Wahlström, 2012), and a lack of specific subject content, which together created a situation in which the power to direct came to lie in formulating goals for different grades to be examined through central tests.

As a consequence, assessment has unquestionably assumed a central place in the new education system, with considerable implications for the inspection system (which have been analysed in Chapter 7). The central role of school inspections and record keeping, the reformed teacher training curriculum (with its focus on assessment techniques), changes in the 2010 Education Act and the reformed grading system introduced in the 2011 Curriculum, all embody the idea of quality control through goal attainment within a logic of international comparison and competitiveness. Inherent in all these changes is the idea that 'equivalence' is realised through offering the same education and assessment approach. This is evident in the decision to set up a stricter inspection and assessment system, ratified by the government bills 2007/08:50 and 2007/08:87).

As illustrated in Chapter 7, inspections do not take into account the specific circumstances of the school and its population (Lindgren et al., 2012; Lindgren, 2015). If the bases for judgement on the topic of 'knowledge' are freed from contextual variables (such as the specific circumstances of the school), achievement of results becomes the only way to ensure that national goals have

been fulfilled (Lindgren, 2015). This discussion highlights the complex nature of the inspection task in the light of new assessment policies, and the potential contradictions between a system based on strict accountability and a flexible steering by objectives approach, which, as illustrated in Chapters 6 and 7, leave extensive flexibility to schools regarding pedagogical approaches and organizational practices.

This background helps to frame and contextualise remarks made by staff about assessment, the changed nature of their role, and the responsibility they feel schools have to succeed and attain goals set out in the national curriculum. In relation to the curriculum, it is worth noting here that the discourse of responsibilisation (highlighted in Chapter 2), features heavily in the 2011 Curriculum. The word responsibility is mentioned 36 times in the 20 introductory pages of the document alone. The responsibilities of the school principal are given particular emphasis, as follows:

As both the pedagogical manager and the person responsible for school staff (teaching and non-teaching), the Principal has complete responsibility for making sure that the work of the school is geared towards the accomplishment of national goals. The Principal has also the responsibility for monitoring and assessing school achievement against national goals and knowledge requirements.

(2011 Curriculum:7)

The role of the principal was defined quite differently in previous curricula, including the 1994 Curriculum, where there was greater emphasis on local autonomy and local work planning, and a pedagogical focus on cross-subject education was still present (although considerably reduced in comparison with the 1969 and 1980 curricula).

Having outlined this background, it is appropriate now to move on to provide an analysis of data from school visits and interviews.

8.3 Equivalence as delivered through common assessment practices

In interviews with members of staff at the two case study schools, the term equivalence was brought up spontaneously by informants only in relation to assessment (seven times at Parkview and nine at Stoneville). Other dimensions of equivalence, linked to older interpretations of the term (such as respect for students' individuality or provision of common national programmes, discussed in Chapters 4 and 5) were not mentioned, although they are enacted through school practices (as

shown in Chapter 6). In offering this interpretation of equivalence, teachers demonstrated that they are well aware of recent policy developments and requirements to standardise their practice.

Equivalent education is defined in the 2011 Curriculum as follows:

The Education Act requires that the education provided in each school, regardless of their location, shall be equivalent. National goals specify the norms for equivalence. However, equivalent education does not mean that the education should be the same everywhere or that the resources of the school are to be allocated equally.

(2011 Curriculum:10)

Inspection reports for the two case study schools from 2012 and 2013 highlight results, and compare these to results achieved at other schools in the Stockholm municipality and to national averages. However, these reports do not take into consideration the specific assessment methods used in the schools, whether summative or formative. In interviews with teachers, great emphasis was placed on assessment methods and, in particular, the implications of these for teacher workloads. Teachers seem to be both subjects and objects of assessment practices, 'caught up' in the machinery of new policies, or what Michael Barber (2010) terms 'deliverology'. The spaces for negotiation and contestation of policy are relatively few and, for the most part, shaped by a sense of necessity and responsibility as teachers try to 'do their best' (Ball, 2003b). Interviews suggest teachers are sometimes uncomfortable with developments in assessment policy, but are mostly 'willing selves' (Ball, 2003b) as they measure and compare their students and attempt to find a balance between the interests of students and the interests of 'the school'.

Equivalence... it's that we all grade the same... We can be different learners... but equivalence must come in assessment. And it is also connected to how we give feedback and where students are... but we can also be different in the way we do it... it can be on the google drive or in meetings... as long as it is open, visible and continuous.

(Fredrik, Stoneville)

As well as confirming the association between equivalence and assessment, Fredrick's quote is relevant as it focuses on one aspect that is not covered in inspection reports: assessment methods and feedback. As long as goals are attained, teachers and schools can choose the assessment strategies that suit them best (*Skolverket*, 2003). However, for members of staff, it is important that both results and assessment processes are visible and clear. As Foucault explains, 'discipline power imposes on those whom it subjects a principle of compulsory visibility [...] it is the fact of being constantly seen, of being always able to be seen,

that maintains the discipline subject in his subjections' (1979:187). Teachers seem to have absorbed this form of disciplinary power to such an extent they now insist on advocating it themselves and, in doing so, they create a form of self-regulatory discipline. This can be connected to the discussion of responsabilisation and governance in Chapter 2. Teachers become self-regulating entities acting in the interest of the school via the process of goal attainment.

Equivalence in relation to grading, referred to in reasonably favourable terms by Fredrik in the quote above, is given a more critical appraisal by Anna at Parkview.

It seems we have a reform but *Skolverket* and the system were not ready for it... the system hasn't coped with the reform yet....The reports of inspections do not offer feedback and support. We have a pre-reform system of inspections checking on outcomes of new reforms.

(Anna, Parkview)

Anna's quote touches on a point that has been extensively discussed in relation to inspection in Chapters 6 and 7. The system of accountability at the heart of the new education system doesn't appear to be coherently organised; rather it is characterised by contradictions and confusion from the teachers' point of view. Overall, teachers at Parkview seem to relate to policy changes regarding assessment more critically than their colleagues at Stoneville. However, even in the quote above, Anna does not seem to challenge the standardisation of practice *per se*; rather she focuses on a lack of central support for teachers, who are invested with the heavy responsibility of setting grades and fulfilling national goals. This quote can in fact be connected to some of the comments made by Stoneville teachers about international students and staff (reported in Chapter 7). Although the context is different, both sets of comments highlight the supposed mismatch between the 2011 reform and the wider school market system resulting from freedom of choice and the Voucher Reform, and a system of inspection still geared to the previous school setting and therefore unable to support institutions to improve.

Other teachers express concerns about the feasibility of achieving equivalence through assessment procedures:

The equivalence thing is nonsense, it's about making grades comparable across schools... but I don't see how this is possible in this system. I mean I can discuss with my colleagues, but if I go to another school it might be completely different. So there is a lot of pressure about doing the right thing.

(Michael, Parkview)

Equivalence in grading? At the end of the day the teacher is responsible for setting the grades so what makes it true that an A student from our school has met... or has learnt as much as an A student from another school... I don't know. It is a little bit of a question mark and it is a question also in the background that worries students and parents comparing results with friends at other schools. It's not fair...I don't know how to answer that... don't know if it is possible. But we are responsible for the grades. (Claude, Stoneville)

Both Michael and Claude highlight the heavy responsibility teachers bear for implementing the policy of equivalence and the element of insecurity this generates to 'do the right thing', which in this case means setting fair grades. The discourse of responsibilisation, outlined in Chapter 2 in relation to other social policy changes in Sweden, is clearly evident once more in this discussion of assessment. In the next section, the role of state support (*Skolverket*) in grading will be analysed in more depth. What is relevant to highlight here is the fact that teachers engage with equivalence locally, at school level, focusing mostly on their own performance as professionals. Claude, in particular, appears to be concerned by the potential reactions of students and parents who she worries may question her professional judgment with respect to grading and assessment. Indeed both of the quotes above express some apprehension about the new core role of the teacher: assessing students.

Assessment is administrated locally in Swedish schools. National exams are used solely for statistical purposes such as compiling national league tables, not to establish students' final grades (which determine higher education eligibility). New assessment policies, as well as the 2011 reform stipulating that only qualified teachers set grades, challenge teachers' identity by constructing their professional expertise not as educators but principally as assessors.

Now we have a new reform starting that only qualified teachers can set grades. We need qualified teachers for marking. (Deputy-Principal, Stoneville)

As Ball and Maguire point out, 'different narratives of the teacher and teaching are discernible within different policies, which also shape what it means to be educated' (Ball and Maguire, 2012:72). In this case, teachers at Parkview and Stoneville are constructed by the particular historical interpretations of equivalence that form a central part of each school's ethos. At the same time, their practices are standardised within the same vision of assessment and 'deliverology'. The interplay of these forces (of differentiation and standardisation) shape teachers, and make them what and who they are in school and in the classroom. The 2011 reform

shapes teachers first and foremost as assessors, bearing the responsibility for setting grades. In the Stockholm education market, grades are the most obvious means to maintain the reputation of the school as well as to attain equivalence.

8.4 Assessment and central state support

The discourse of responsibilisation and individual responsibility of teachers is clearly evident in relation to summative assessment. As the quote from Anna in the previous section illustrates, teachers experience summative assessment as a heavy responsibility and do not feel fully supported by the central system of guidance. While equivalence standardises assessment, in the sense that schools need to use the same assessment framework and achieve the same goals, the lack of clear guidelines in relation to grading allows considerable flexibility to individual schools.

On the *Skolverket* website, the new grade descriptors appear as follows:

Grading scale according to 2010 Education Act	Previous grading scale	Numerical value	Description
A	(MVG) Pass with Special Distinction	20	Highest pass grade
B		17.5	
C	(VG) Pass with Distinction	15	
D		12.5	
E	(G) Pass	10	Lowest pass grade
F	(IG) Fail	0	Fail grade

Table3. Grade descriptors (2011)

The traditional grade scale has now been broken down further into a set of more specific categories. However, category descriptors are not accompanied with further information or concrete examples to help orientate teachers. In fact, the web pages dedicated to the new marking scheme explain that some terms, which are the same across subjects, require teachers to interpret them contextually.

A number of key terms are used in the knowledge requirements and can be found in many of the subjects. To a great extent, these words take their meaning from the context in which they are used and it is therefore

not possible to provide any general definitions. Teachers are responsible for contextualising them.
<http://www.skolverket.se/om-skolverket/andra-sprak-och-latlast/in-english/2.7806>

Given the vagueness of the curriculum, teachers in Swedish schools are invested with the heavy responsibility to train students in general skills and competences with little in the way of content guidelines.

In a study of continuous professional development (CPD) Wermke (2011) notices how the current system makes teachers dependent on their individual school management for support to interpret *Skolverket* policies. In Sweden, principals control their teachers by allocating resources. However, it is up to individual principals to decide to what extent and how information from *Skolverket* is disseminated (Berg, 2000; Wermke, 2011). They will often base their decisions on the school budget, as *Skolverket* training courses are not free for schools.

Teachers, constructed as assessors, have the responsibility to determine grades individually and at local level, as no central system is in place to encourage inter-school dialogue on grade descriptors. Neither is there any central support for this from *Skolverket*. At the same time, individual schools are encouraged to reach goals in the way that suits them best, again prioritising their interests over a coherent and shared interpretation of grades. As Lindgren points out:

The curriculum—which is regarded as a sturdy legal basis on the front stage—is regarded as a somewhat diffuse and problematic basis for judgments. [...] There are a lot of value-words—this and that ought to be acceptable [*tillfredsställande*], sufficient [*tillräcklig*], based on the students' prerequisites [*förutsättningar*] [...] the question is where to draw the lines.
(Lindgren, 2015:16)

Hence a contrast seems to emerge in relation to grading between individual versus collective notions of professionalism, which will be analysed further in Chapter 9. The process of devolving responsibility to the individual, analysed in a number of different examples over the course of this thesis, reaches in this policy another high point. The state constructs teachers as assessors individually responsible for determining grade descriptors in the absence of a common framework of reference where this negotiation could take place. Responsibility is therefore fragmented across individual schools and subjects.

The biggest struggle is to do the marking... as the grading criteria have moved. It has now changed... it is exactly the same stanzas, but they changed the adjectives to differentiate the grades. So you get a bit of a struggle. What is the difference between this and that? This is not easy... everybody is stressed, students are, we are, and parents are. I

feel it is up to me to decide, we do not have a tradition of mutual support here. (Maria, Stoneville)

Here you're almost judging yourself because you will be teaching the students and then you will be giving a grade. So you are influenced by what you see during the year, you try not to be but sometimes you cannot help but to be... it is a difficult thing. (Claude, Stoneville)

Comments about not having a 'tradition of mutual support' at school level and 'judging yourself' illustrate the shift in focus away from teachers as members of a collective body to teachers as lone professionals held individually accountable for performance and results.

Whilst teachers at both schools are critical of the individual responsabilisation implicit in new approaches to assessment, they respond differently. Such responses can be understood in terms of a new 'politics of activation', which shifts responsibility on to individual citizens while limiting the possibilities for action via traditional politics. The work of the Commission of Democracy (1990), analysed in Chapter 4, is a clear example of this trend; from this perspective the state must 'pull back' and 'make way' for small-scale, self-managed associations (Dahlstedt, 2009).

While teachers at Parkview engage critically with the policy changes, teachers at Stoneville seem more concerned with finding successful strategies to deal with their frustrations and difficulties:

The standard is checked in school inspections, although the criteria are very political, such as democracy in the classroom and other things, the environment of the school... [there's] nothing really about how to assess and mark. (Lars, Parkview)

I think no one in this school would say it is enough, the support we get from *Skolverket*. It is not enough, we have to sort out how to grade... but to some extent it is not my position to think about that as I have to follow the curriculum. If I didn't follow it I would not be a professional teacher; so I have to follow it and I have to find the right way. (Sven, Stoneville)

Lars's quote echoes his colleague Anna's remarks about a mismatch between desired policy outcomes (achievement of national goals through equivalent assessment) and procedures (flexibility for individual schools and the continuation of a pre-reform system of inspections). In contrast, Sven focuses less on criticising the changes, and more on the need to comply with new norms in order to be seen as 'professional'.

At Stoneville, criticisms of the new policy are made in the context of criticisms of the supposedly loose Swedish system, which again connects to the branding of the school highlighted in Chapter 6:

But something I have learned about this curriculum is that if something is more specific it doesn't necessarily mean that it is written or communicated in a more practical way. There are still a lot of teachers digesting what is there and how I can come out of this. [...] I asked *Skolverket* for help and the reply was 'well, no... we believe it is for you as teachers in schools to contact each other and discuss'. In Swedish, 'discuss' is a big thing, discuss this, discuss that and then you'll come to a consensus of what you think is right... which really didn't make people feel any better. It's more the case of: 'can you please do your job, can you please take responsibility and take a team of education professionals and create something that we know will work as opposed to asking us to do the job for you?' (John, Stoneville)

John's quote combines two major criticisms. First, John uses the supposed looseness of Swedish academic culture to challenge one of the founding values of Swedish education, democracy and open discussion. Second, he highlights the lack of central responsibility for a core aspect of the new curriculum, grading, and posits external assessment as a possible solution to guarantee fairness and comparability.

I think centralised testing would be lovely. That would help to give structure and focus. The national tests really set the level. In history there is no example, and I really, really need that... as you are relying on your own judgment. (Anna, Parkview)

My subject [religion], unfortunately, doesn't have national tests. It is always a struggle to grade students... Am I doing it right? It's the part of my job I really don't like very much. (Maria, Stoneville)

As noted in this section, the opinions of teachers at the two schools seem to converge in relation to the concept of individual responsibility of teachers as assessors. Teachers at both schools feel that they would benefit from more centralised control over grading and clearer guidelines. Nevertheless teachers at the two schools differ in the way they relate to the new regulations: critically, in the case of Parkview, and in a performance-oriented way in the case of Stoneville. These differences reflect, once again, differences in the interpretation of equivalence (and school ethos and approach to education) at each school.

8.5 Schools and assessment models

As mentioned above, neither the curriculum nor school inspection reports mention methods of assessment, apart from stating that these should vary. Varied assessment is in place at both schools, although supported for different reasons:

We try to give them this opportunity to go with their strengths. They can do a performance or presentation or essay. We try to reduce more and more the writing as there is no time to mark... we are trying to cut it down. But mostly, it is a way for them to go with their strengths. (Michael, Parkview)

Assessment should be varied... it is vague in a way but the course descriptors are only one page. It is difficult as you have to interpret what they mean and do it... and it can be different also in the same school. But it has to be varied, as *Skolverket* says. (Fredrik, Stoneville)

For Fredrik, assessment should be varied as *Skolverket* says so and because meeting national requirements is central to the school's ethos. Michael, on the other hand, shifts attention to students and the opportunity they must have to be assessed on their individual strengths. Student freedom was very evident during school visits to Parkview, where students engaged in group-based projects were free to decide how to contribute to their work. It was also evident in the local curriculum itself, which permits students from different programmes to work together in mixed groups and to be assessed carrying out cross-subject projects. Michael's quote, however, also focuses on another point as well. He points out that concerns about increased workload influence the preference for certain forms of assessment over others, for example a preference to limit written tasks.

At Stoneville, as well as wanting to comply with *Skolverket's* regulations, assessment is constructed as central to the strengths of the school, guaranteeing academic rigour and encouraging student independence and responsibility:

We try to give them the opportunity to choose the topics of their essays for example, not just in terms of ok make sure that they have a bit of freedom... but also freedom makes them appreciate the concept of responsibility and making choices... ok we are free and what does it imply then? Ok you are free to go home and not to do anything but also you're free to organise yourself to produce something that reflects your level and get a good result... that's for them to work with. We are proud of this. (Claude, Stoneville)

In this way, rigorous assessment becomes part of the school's branding strategy:

We do national tests even though in modern languages we are not obliged to, they are not part of the compulsory subjects.... but we do because we think it puts the subject on demand and also it is good guidance for us to see how they perform in the national tests... So it is good to reassure students and parents yes you can do this, we have done things right... because again we are setting the grades... and they know this is done in an organised way. (Lukas, Stoneville)

I don't think we are strict, I think we are doing it right. [...] This is an academic school, traditional in many ways... it is hard to get good grades here. And then they talk to the parents or to friends in other schools who get better grades... but they are better prepared here, they work hard. (Stephanie, Stoneville)

The lack of central control over content and assessment models and the discourse of individual teacher responsibility have become part of Stoneville's branding and identity, which is contrasted with the supposedly unstructured, traditional Swedish

system. A 'traditional, academic school' in this respect guarantees fair and correct grading and also guarantees success in higher education. At Stoneville a 'performativity discourse' is prioritised over a 'humanistic discourse' (Jeffrey, 2002). Comparisons are made with other schools and between students, who are categorised as being more or less able to 'work hard'.

In summary, the new student and teacher training curricula, and the upper-secondary school reforms, together serve to construct teachers as assessors who are individually responsible for the grading of their students. Their qualified status means they are free to set grades, but in the context of national goals, with the instrumental aim of helping students progress to further studies, and with little centralised support. In the context of the Stockholm school market, the approach to setting grades (with no central support) generates competition and rivalry between schools, as will be shown in the next section.

8.6 Competition among schools and fair grading

As mentioned in the previous section, Stoneville's staff members regard their approach to assessment as unique to their school and key to its identity. This is confirmed by a number of teachers in interviews:

We are very serious about grades, not like other schools.

(Marta, Stoneville)

It's harder to get an A here than at other schools.

(John, Stoneville)

At Parkview the focus on rigorous assessment is less marked. Teachers highlight that the prestige of the school rests on multiple factors, not just academic but also relating to the school environment as a whole. This issue is raised, as mentioned in Chapter 6, in relation to the awareness of teachers at Parkview that they are working for an 'elite' school. It is reaffirmed in relation to grading:

Students say that if you get a C here is like an A in the suburbs.... but here the status of the school is more beneficial than the grade itself... you get the social network and the reputation of the school itself that opens doors.

(Peter, Parkview)

Peter's statement demonstrates staff appreciation of market mechanisms and the cross-school competition to which grading and assessment contribute. Lars, also from Parkview, expresses a more critical position:

Equivalence in assessment is a utopia. From a political point of view teachers should meet from diverse schools and work together to reach

a certain level of equivalence. We should do it in the evening... not during the normal school day, which makes it impossible to happen.
(Lars, Parkview)

Following its 2012 inspection report, the Parkview Deputy-Principal and some of the teachers who were interviewed for this thesis established an inter-school group to discuss and agree grade descriptors in order to harmonise the grading process (this is highlighted in the school's steering document analysed in Chapter 5). While arguing in favour of such a development, Lars cautions about the practical and cost implications (also evident in discussions about teacher training in Chapter 7) as it is difficult for teachers to find the time for such activity inside normal working hours.

At Stoneville, the same problem is considered from another point of view, that of inter and intra school competition:

Some teachers feel the entire system is a flop as there is no interaction between schools... but this cannot happen unless it is centrally set. If you are on your own... there are many obstacles. You have to present yourself in a non egoistical or defensive way. I find that there is a sense of competition within a school culture. Then there is a power struggle about pedagogy and I think it is very difficult to see through that when you work with teachers from other schools as everyone puts up their guard.
(Maria, Stoneville)

And we do not work with the other gymnasium... I would like to and I need to do that but we haven't done it... well it is also competition... and this is the worst year in term of numbers for schools in general. From next year it will grow again. So it is difficult to work with people you have to fight, if we have the same programme... but sometimes I think it would be good just to talk and see how they do things... but we have no time and mostly it is because of competition.
(Fredrick, Stoneville)

What emerges from these quotes is a construction of teachers and schools as individual, isolated units, each responsible for their own achievement and competing against each other as a consequence of the new policy changes. By granting full flexibility to schools, and by giving teachers the responsibility for students' final marks without a centralised network to support them, these policies create a fragmented education system in which schools avoid communicating with each other and teachers put up their guard.

In interviews with teachers, assessment was frequently mentioned, often in relation to workload, stress and responsibility. However, the focus of discussion was always on summative practices. Not a single teacher mentioned assessment for learning (or formative assessment), even when talking about differentiation and pedagogy. During my visits to Parkview, I noticed that teachers were using locally designed rubrics to assess students' work and that these were also given to students for self

and peer assessment. This approach clearly enhanced students' awareness and independence, and the relationship between teachers and students. Nevertheless, when talking about assessment, teachers focused solely on summative work and grading. In this respect it seems the new policies have cast a rigid shadow over what teachers are expected to do, and how they think about their priorities. Equivalence has come to be equated with assessment, and assessment is summative.

Torrance (2012) very clearly articulates the negative implications of conceptualising assessment in such a narrow and mechanistic way, arguing that such approaches dominate teaching and learning in a way that is 'deformative' (Torrance, 2012). He argues that 'assessment as learning' constitutes a refashioning of the education space into 'a learning machine' (Foucault, 1979:147) focused on 'supervising, hierarchising and rewarding'. In such an approach, schools turn into a 'centre of calculation' (Latour, 1986:253), a place where professionals make use of information as a mean to make authoritative decisions.

In such complex context, the grading of borderline students becomes particularly delicate, as funding of free schools is attached only to successful students who receive a pass mark in every course they take. This means that whilst the culture of performance focuses attention on the 'improvement' of all students, some 'improvements' are more strategically important than others.

The problem in independent schools is not the high grades but giving a 'pass' to everybody, as schools get money only if students pass... if they don't it's the school's problem. But if the students pass and they are weak, then it's the students' problem. (Peter, Parkview)

This problem has also been noted in various research reports on assessment in Sweden. A continuous and consistent focus on results places high demands on teaching staff. In an attempt to meet particular goals and achieve certain economic benefits for their school, teachers are inclined to focus their work on the fulfilment of minimum requirements. The danger of such an approach is that students who perform just above the lowest threshold are neglected (Arvola Orlander et al., 2004; Wermke, 2011; Lindgren, 2015).

Chapter 6 showed not only how conceptualisation of the 'the ideal learner' is dependent on each school's particular context and ethos, but also how it reflects the kind of 'return-thinking' characteristic of education constructed as private investment. Self-interest and status acquisition mix with classical liberalism's selfish

and competitive individual and self-governing citizen (Ball, 2007:175-6, cited in Beach and Dovemark, 2011) in ways that are resonant with recent education policy formulations (Dahlstedt, 2009). Individual and school success comes to rely on status desire and patterns of competitive consumption.

Conversely, such a conceptualisation of education and the ideal learner suggests that lack of education success is associated with the absence of selfish interests and a need for academic status and recognition (Beach and Dovemark, 2011). The failing group is positioned as lacking success not necessarily because of the absence of intellectual abilities, but because of the lack of self-interest and expectations in terms of private return (Beach and Dovemark, 2009 and 2011; Johansson, 2009).

Peter's quote sheds light on yet another dimension of grading under the new policy system. Responsibility flows from the school (which must decide how to reach national goals), to individual teachers (who must set grades), and finally to individual students (who are left to deal with 'their problem' in the event that they receive a borderline pass). Running through the assessment policy in this way, the discourse of responsibilisation creates opportunities for different and unexpected outcomes at every level. Policy enactment is not a straightforward and rational process and outcomes are not easy to predict from policy intent. As Mussella (1989:100) writes:

It is not easy (and sometimes impossible) to identify which implementation practices will lead to the desired outcomes and what unintended, and undesired, outcomes will emerge.

8.7 Conclusions

The interplay of different policy changes related to assessment and the role of the teacher has shifted the focus of Swedish upper-secondary education decisively and comprehensively towards grading and quantifiable results. This is in stark contrast to the traditional Swedish approach to education, in which students were not graded until the end of secondary school and, even then, only by their local school. The long shadow of accountability, created by international comparisons, and revised and restricted notions of quality (Bergh, 2011) has ensured that summative assessment has become a central element of education. In such a context, assessment becomes an end in itself (Lindgren, 2015); it is the result that counts. Teachers at both case study schools highlight the centrality of assessment to their workload, and to their relationship with students and parents (as high grades are key to accessing higher education). As Ronald Dore (1997) puts it, in the process of

qualification pupils are concerned not with mastery, but with being certified as having mastered. Rather than learning for its own sake or learning to do a job, the emphasis is on learning to get a job or a placement.

New policies also stress the role of individual teachers as assessors. Carlgren and Klette (2008) portray Swedish teachers as lacking the necessary confidence to make full use of the freedom they have in the way they are asked to carry out their work (Wermke, 2011; Wermke and Höstfält, 2014). The discourse of responsibilisation, already noted in relation to healthcare, housing and labour market policies, is clear. So too is the shift from collective to individual professionalism, which will be analysed in depth in the next chapter.

It can be argued that for almost the past sixty years, policies have focused on finding 'solutions from above' to regulate people's lives in a way that has deeply affected personal initiative and inventiveness (Dahlstedt, 2009). At the same time, 'a partnering society needs partnering citizens' (Palola et al., 2006, cited in Dahlstedt, 2009). Following Foucauldian perspectives on power and governmentality, 'partnering subjects' have specific characteristics, for example receptiveness, answerability and a commitment to consensus generation (Dahlstedt, 2009). Teachers as assessors are partnering citizens, fully aware of and invested in their responsibilities.

The idea of equivalence as standardisation of practice and the attainment of national goals through grading is unchallenged in both schools. While at Parkview teachers relate more critically to policy changes, the school management team is decisive and unequivocal in its adherence to 'standards' and to protecting the school's image. This sets narrow and well-defined conditions for the enactment of policy, in which power relations are explicit. There is little or no space for 'alternative' interpretations. Even if, on occasion, members of staff distance themselves from the interpretations and the strictures conveyed by organisational leaders, the majority conform to them nonetheless.

As has been demonstrated, at Stoneville, assessment is elevated still further to a tool for branding and marketisation. Critical of the more traditional Swedish, 'humanistic', and supposedly unstructured approach to education (Jeffrey, 2002), the school emphasises 'hard work' and results, and the opportunities this unlocks. Finally, school inspections focus on results and grading in a way that has come to be seen as largely unproblematic, despite the contradictions that are created by the

flexibility inherent in policies of choice. In a situation in which central control of education and inspection and assessment are supported by all parties (Rönnerberg, 2014), it is important to question whether particular voices have been excluded or devalued in the current hegemonic understanding of education policy (Bacchi, 1999 and 2009; Rönnerberg, 2014). The next chapter will look more specifically at the voice of teachers and their 'freedom of action' within the school environment.

Chapter 9

The role of the teacher

9.1 Introduction

In both case study schools, local policies embody a notion of equivalence as standardisation of practice in order to achieve goals and meet the demands of the newly implemented assessment policy. However, as Chapter 6 illustrates, equivalent education is enacted in different ways in each school. At Parkview, a pre-voucher reform notion of equivalence dominates and is expressed, for example, in ideas about respect for students' individuality within a common framework that aims to include all students. At Stoneville, the focus on results and achievement of objectives are central to the school ethos, reflecting a mid-1990s construction of equivalence. As illustrated in Chapter 6 and 7, these different interpretations of equivalence are key to the branding and marketing of institutions striving to attract different student populations with their distinctive philosophy and ethos. However, the way in which these schools shape and maintain their individual identities within the framework of standardisation established by the new equivalent policy and the recent upper-secondary school reform demands further exploration.

Mintrom (2003) contends that independent schools are fundamentally market organisations. He argues that such schools have little protection from market forces as they have neither a guaranteed budget nor guaranteed enrolment. Hence the ability of these schools to succeed turns on the cohesive efforts of all employees to satisfy their consumers. These efforts have consequences for teachers' individuality and professionalism; indeed teachers are selected to fit with and reflect particular models of schooling. Fredriksson (2009) defines independent school teachers as 'market-oriented teachers'. By that he means professionals who are involved actively in the marketisation of their schools and who must comply with regulations set by their employers, for example, not contacting the media about internal problems. In Fredriksson's analysis, teachers are required to conform not only to the formalised aspects of organisational life (as expressed in policy documents, instructions, organisational structures and technologies) but to informal aspects too (such as institutional norms, routines, procedures, conventions and roles).

The *Skolverket* report, *School choice and its effects in Sweden* (2003), points out how equivalent education creates room for individual school leaders to decide how to go about their work, including managerial flexibility in staff recruitment, salary

negotiation and school management in general. Nevertheless, as Ball points out, 'it is a mis-conception to see these reform processes as simply a strategy of de-regulation, they are processes of re-regulation' (Ball, 2003a:217). As was evident in the analysis of employment, housing and healthcare policy (outlined in Chapter 2 and linked to debates about education in the last two chapters), the state has created a new type of less visible, 'lighter-touch' regulation (Lawn, 2006; Thörn, 2012). In education, this can be seen in the introduction of policies designed to 'responsibilise' school principals (2011 Curriculum) and teachers with reference to assessment. These initiatives constitute a new 'regulative ensemble' (Anglietta, 1979:101), with moral, textual and physical aspects, through which policy-makers in 'advanced liberal' societies attempt to govern (Rose, 1996:58). As noted in Chapter 7 and 8, inspections are a key element of this process of re-regulation. In Sweden, and other counties, it is clear that external assessment and inspections are now considered to be successful tools of governance (Ozga et al., 2011). However, policy choices are not unproblematical or unbiased. As Lascoumes and Le Gales (2007:1) put it: 'the instruments at work [...] produce specific effects, independently of the objective pursued [...] and these instruments structure public policy according to their own logic' (cited in Rönnberg, 2014). The self-regulation that teachers at Stoneville display in relation to assessment procedures, illustrated in Chapter 8, is an example of such effects.

In the new regulative ensemble, teachers are caught in a tension between their traditional academic role in class (something that many, particularly at Parkview, regard as the only valuable aspect of their role), and their work as employees within organisational structures and subjects of the curriculum and state governance (Altrichter and Rürup, 2010; Heinrich, 2007; Hopmann, 2003; Surgrue, 2011; Terhart, 2001; Wermke, 2013; see Wermke and Höstfält, 2014). In this context, teachers are persuaded to embrace new identities and to reimagine themselves as individuals who strive for excellence, reflect on their own practice, and take steps to improve their skills and productivity. Ball argues that this amounts to a new 'existence of calculation' (Ball, 2003b:217) in which value replaces values. They are 'enterprising subjects' (Ball: *ibid*), that enact an 'enterprise of the self' (Rose, 1989). Or to use Bernsteinian terminology (1996:169) in this ensemble 'contracts replace covenant'.

Against this background, this chapter explores the role of teachers in both case study schools, and highlights how the different interpretations of equivalence

enacted in each school impact on teachers' practices and identities. Some of the themes analysed in this chapter have already been introduced in Chapters 6 and 7 with regards to school identity and the relationship between teaching staff and management. This chapter will delve into these themes in greater depth, focusing specifically on the role of teachers. Teachers at Parkview and Stoneville both reflect and contribute to the different models of equivalence enacted in their schools. In interviews, teachers described their work with reference to the discourses each school uses to brand itself, as has been already highlighted in Chapter 6. At Parkview, this discourse emphasises tradition and expertise, while at Stoneville it emphasises the social and instrumental aspects of education.

Market-oriented teachers (Fredriksson, 2009) personify the school ethos and adjust their teaching practices to meet the requirements of their employers. They also play a role in promoting their schools at fairs and other public occasions. In helping to market the school and complying with school instructions, as well as entering into individual salary negotiations with employers, teachers loosen their ties with a collective professional body whilst enhancing their individuality and ties to their local school context.

Such a shift can be noticed in both of the case study schools, although the market-oriented approach to the profession is constructed differently at each institution.

Parkview teachers often refer to a discourse of traditional education professionalism, centred on academic expertise; the intention is often to highlight the prestige that the school gains from hiring them. This is a traditional professional discourse based on 'authority, licence and legitimation' (Svensson, 2006:579):

We are good at what we do here. We are experienced and qualified. We know what we are talking about, and students who appreciate this appreciate us.
(Michael, Parkview)

In contrast, staff members at Stoneville define their professionalism in terms of results achieved by students and their role in facilitating interaction in a multicultural environment. Indeed at Stoneville great attention is given to disciplining aspects of education:

We want them to learn how to work in a group and respect each other.
(John, Stoneville)

There is a social aspect of education which is crucial for us. They have to acknowledge each other and their teachers, and there has to be an atmosphere of mutual respect and collaboration.
(Claude, Stoneville)

Stoneville's teaching body is largely international. Staff members come from different backgrounds and education traditions, yet they demonstrate a high level of ability to adjust to and embody the school culture. They build their professionalism on 'contextual competence rather than general capability' (Svensson, 2006:579); in other words they are willing and able to re-shape their identity based on their school's particular model.

9.2 Teacher autonomy

9.2.1 Parkview

Parkview teachers tend to reflect critically on the implications of working for 'the private sector, the business world' (Anna, Parkview, cited in Chapter 6), in particular in relation to goal setting and school vision, where teachers do not feel fully involved in the decision making process:

They want to push the school to be one of the best... innovative, we've got one to one solutions with laptops, and there is a push there, there is an ambition there. But sometimes there is a clash between the pedagogical world and what's realistic... So... yeah, and ... there are certain decisions that the micro-level can make, or push for and suggest, but the bigger picture is already decided. This, yes... can often lead to a clash... (Anna, Parkview)

Anna's quote describes a relatively clear division of roles in 'the organisation', already introduced in Chapter 7 in the discussion of relations between teaching staff and management. Teachers and the board/management are seen to operate in two different and distinct spheres; where they intersect, clashes often arise. Teachers' frequent use of the term 'they' in interviews to refer to managers suggests a lack of association with the administrative and organisational aspects of the running of the school. However, the frequent use of the pronoun 'I' (rather than 'we') when discussing teaching activities also suggests the absence of a strong collective professional identity among teaching staff.

Such a separation between the spheres of teaching and management grants teachers a certain level of freedom and independence in their daily professional life. In interviews, teachers revealed that they feel they have the autonomy to plan and deliver courses according to their preferences, beliefs and expertise, and this is generally considered positive and empowering:

I think there is quite a lot of freedom and we get support from the management. (Peter, Parkview)

We are trusted as professionals, we can try and experiment, this is very good.
(Anna, Parkview)

For Parkview teachers, individual autonomy is an expression of trust and professionalism:

I believe that a good school trusts the professionalism of every teacher, his choices in the classroom, his academic expertise, and let him experiment.
(Lars, Parkview)

Staff members at the school argue that granting teacher autonomy over curriculum and pedagogy is a way of attracting highly qualified people, such as academic researchers and well-known artists. These people bring valuable connections with external institutions and can expose students to a range of high profile cultural and scientific projects (Parkview, *Verksamhetsplan*, 2012 and 2013). In so doing, they add to the prestige of the school.

Our students can carry out their third year project at Stockholm University thanks to some of our teachers, or at the [CEMS] art foundation, or more.
(Deputy-Principal, Parkview)

Just one of the teachers interviewed discusses autonomy in negative terms, focusing on the lack of a shared pedagogical vision that he perceives results from this:

We can do pretty much what we want. We do not have a pedagogical framework, which is actually.... I don't like it, the school is too flexible... pedagogy is not in focus... we are not motivated to improve in our pedagogy.
(Michael, Parkview)

This point about pedagogy, and the lack of focus on building a cohesive team of teachers working along the same lines, has been already introduced in Chapter 6. Although Michael is the only member of staff to regard the heterogeneity of pedagogical approaches as a weakness of the school, his observation is in line with a comment made in the 2012 inspection report (March 2012):

The Principal does not seem to be deciding on plans, teaching or actions specific for students' needs and learning; how these are monitored and evaluated is decided by individual teachers [...]. Some students in Year 1 express that information, feedback and course plans vary between teachers.
(*Skolinspektionen*, 2012:9)

The report recommends that an action plan be put in place to tackle the lack of a common pedagogical approach, and states that this will be checked at the next inspection.

Thus teacher autonomy, one of the key elements of Parkview's interpretation of equivalence and their marketing strategy, is considered by the school inspectorate to be a deficit to be rectified.

At Parkview, marketing materials and school steering documents (*verksamhetsplanor*) from 2012 and 2013 place great emphasis on teacher autonomy, and on the cross-curricular organisation of the timetable. As discussed in Chapter 5 and 6, together with respect for students' individuality, these are defining elements of 'equivalent education' at Parkview. In the *verksamhetsplan*, highly qualified teachers are presented as central to the organisation, and their ability to foster links with external institutions is regarded as an important element of pedagogical innovation. Some of Parkview's projects are given particular prominence in marketing materials, such as the maths project led by an award-winning maths teacher in collaboration with the Ministry of Education. This project was highlighted in the 2012 school brochure and given even greater emphasis in the 2013 edition. In 2011 and 2012 the school performed slightly below the national average in maths (*Skolverket*, league tables 2011 and 2012), but there has been considerable investment in maths education since then, as some teachers confirm: 'there is quite a lot about maths, putting maths in different projects' (Jill, Parkview).

The student body appears to be very cohesive. During my visits to the school I observed students engaged in a number of different activities, including cross-curricular projects (where they worked with little supervision from teachers) and student-led events. They demonstrated great commitment to these activities, invested time and effort in areas of particular individual interest, and collaborated constructively (for example in collecting statistics on a particular topic, budgeting, designing graphics for the project presentation, or writing final reports). Students appeared to be used to independent work and able to debate, negotiate, and make decisions without direction or guidance from teachers.

The lack of strong, central control of teachers and of harmonisation of teaching practices, which is regarded as a deficit in the inspection report, is turned by the school into a powerful marketing tool and a way of enhancing students' individual potentials, qualities, and commitment. However, this approach is challenged by inspections. Yet again the contradictions noted in the previous two chapters between the inspection system and the flexibility of education models generated by the Voucher Reform is clearly in view.

Although teachers' individual autonomy is an essential feature of the school, in order to comply with recommendations set out in the school inspection report, in the autumn of 2012 Parkview set up a working group on assessment and grading in

collaboration with a municipal school offering the same programmes. According to Parkview's Deputy-Principal this group would oversee the development of a shared approach to the interpretation of course objectives and criteria, while preserving teacher autonomy, which remains an unquestioned feature of the school's ethos. In Chapter 8 however, it was noted how teachers had some criticisms of this initiative, as it was supposed to take place outside working hours and did not count as part of their standard workload.

Since the autumn term of 2012, Parkview has also required teachers to record information on their courses on an e-platform, which is available to the school's senior managers, students and parents. This measure is intended to strengthen monitoring and help identify potential discrepancies between teachers' practices, the curriculum and inspection requirements, without affecting their individual teaching styles. As highlighted in Chapter 7, the requirements highlighted in school inspection reports are treated by the school in a way that does not significantly affect their brand identity.

As the above discussion demonstrates, teacher autonomy is strongly promoted by the 'organisation' of Parkview, which seems to value it as a way of attracting and retaining outstanding professionals with specialist expertise and connections.

9.2.2 Stoneville

Stoneville teachers are also granted a certain level of autonomy, which they appreciate highly. However, the way they construct autonomy focuses on the benefits that accrue to students and the measurable results that flow from it, rather than on professional expertise and prestige:

The plus is that you can then shape the course according to your taste and your passion and your enthusiasm, but most importantly according to the group you have. If your group is interested in something, then you can maybe devise a course which is geared on those lines... if the group is stronger and has more ambition. Or if the group is weaker, you are going to put something together which is going to reinforce the basics that they haven't or something... so it gives you more of a feeling that you are justified to do it and that you can help your students achieve.

(Claude, Stoneville)

My freedom helps me design something my students will be able to use and gain from.

(Lukas, Stoneville)

At Stoneville teacher autonomy, constructed in terms of the opportunities it offers to support student achievement, is balanced by centralised control of education quality:

The teachers have the freedom to teach the way they prefer as long as they can justify it through the curriculum. And again that's a beautiful thing provided that nothing is taken for granted... you know you have got the freedom to do things in a certain way, it doesn't mean you offer them less, or facilitate them. You offer them something that you think can work best, that can put them on the right track, and that doesn't necessarily mean the easiest, which I think people can sometimes mix up. So we have a system of class inspections in place. (John, Stoneville)

John's quote highlights once more the link between teachers' work and results. Teacher autonomy is granted within the framework of a results-oriented culture, in which both teachers and students are measured according to what they achieve. Autonomy at Stoneville is not something teachers can exercise in order to plan courses they consider intrinsically valid, or to establish connections with external institutions, as in Parkview. Rather it is a tool to enable them to design courses that can maximise student performance and consequent results. As already noted in relation to Parkview, support for teacher autonomy at Stoneville is counterbalanced by concerns about a lack of investment in teachers' collective development.

There is no incentive for pedagogical development. To be a good teacher here is not about going to courses or discussing pedagogy with colleagues, but about finding a good book and saying: 'This is a very good book and I'll make my students read and read and read'. Or standing up in a meeting and saying: 'I set up a good system on Google drive to share documents'. So I am afraid I only work on my own now, and at first it was a real sadness, though now I am used to it. (Maria, Stoneville)

The lack of a common framework for teachers' development reinforces the perception that new professionalism in equivalent schools is individual professionalism. In this new version of professionalism, each teacher designs their own development path, in line with their own ambitions and interests, or the needs of their employer. The discourse of responsabilisation, highlighted above, is echoed in this particular construction of teacher autonomy. In both schools, albeit in different ways, teachers are held individually responsible and accountable for the school's success. The autonomy they are granted is a tool to achieve such success, either in terms of professional and therefore school prestige (Parkview) or student results (Stoneville).

In the case of Stoneville, this focus on results risks disadvantaging inexperienced teachers in a context where appearing vulnerable or insecure can lead to student complaints:

I think it is more peer influence we need. If you are complete beginner, let's say you'll see what the others are doing and you get an idea of how it's going to be done, and so you don't start from nothing... Students

expect a certain level of confidence and experience so you must get it from somewhere. (Claude, Stoneville)

Claude's quote highlights (as Maria's did earlier) the fact that teachers do not tend to work together or seek out each other's help at Stoneville. Nevertheless, as noted in Chapter 7, Stoneville teachers often talk about themselves as a group, use the subject pronoun 'we' and identify with the values and objectives of 'the company'. They tend to construct the success and achievements of the school in terms of student numbers and results. In contrast to Parkview, school profits and business plans are openly shared and discussed; they are seen as highly relevant to teachers' work and the measurement of their success.

It was pointed out in Chapters 6 and 7 that some Stoneville teachers do not speak Swedish or hold official Swedish qualifications. This means that for some of them, Stoneville is their only potential employer in Stockholm.

By the nature of the company, having many teachers coming from abroad and not having Swedish as a mother tongue... it's like we are captive here, as we might maybe not find the same positions in a Swedish school... so here we are, 'take it or leave it', there is a little bit of that... (Claude, Stoneville)

Having limited alternative employment opportunities may compromise the autonomy of Stoneville teachers in practice; while most appear to comply with school ethos, it is not clear if this is the result of a free, or more compromised, choice (Fredriksson, 2009).

9.2.3 Teaching as an individualised profession

In the Stockholm context, teacher autonomy can be examined from a governance, steering by objectives perspective (Englund, 2005; Dahlstedt, 2009), in which the issue of assessment is key as it relates to what is considered an acceptable knowledge benchmark and how this is measured at state level (Broadfoot, 1996; Hopmann, 2003; Wermke and Höstfält, 2014). Hopmann (2003, see Wermke and Höstfält, 2014) focuses on two types of assessment or evaluation: process evaluation (by that meaning the quality of the teaching, which relates to professional responsibility); and product evaluation (by that meaning student results, which relates to professional accountability). Both these factors are relevant in relation to teacher autonomy. In the two sample schools, responsibility and accountability are positioned as belonging to the individual teacher, rather than to a group of professionals working collaboratively together.

At both schools, market-oriented teachers regard themselves as company employees, and subscribe to a new professionalism which is local and contextual and which identifies staff with the school ethos in a number of ways. While this new professionalism grants teachers a certain level of individual autonomy, this results in a weakening of autonomy linked to their membership of a professional group (Helgøy and Homme, 2007). In turn, this reduces the power and capacity of teachers to negotiate a set of common aims and goals with their peers. The constructions of teacher autonomy and professionalism at both schools seem to mirror those promoted by the new teacher-training curriculum (Beach and Dovemark, 2011), which increases the focus on assessment and subject expertise, whilst decreasing the importance of professional identity formation. As mentioned in Chapter 4, the time assigned to subjects such as philosophy and sociology of education was cut by more than 20% in the current curriculum for teacher education.

At both schools, individual teacher autonomy is celebrated, but schools are criticised by teachers for failing to channel this autonomy into a coherent pedagogical vision. Rönnerberg's (2007) distinction between 'freedom of action' and 'capacity for action' seems very relevant here. The Swedish curriculum grants a high level of autonomy to teachers, both in terms of course content and pedagogy; it does not prescribe the precise content or methods required to deliver education in schools. Early 2000s constructions of equivalence, as highlighted by *Skolverket* in 2003, allow individual schools plenty of room to manage staff according to their preferences and needs. Yet, this freedom is not matched by 'capacity for action' on the part of schools, which do not invest in collective professional development for their teaching staff. This situation plays out in different ways at each school. At Parkview, the school highlights the individual initiatives led by particular members of staff, but doesn't harmonise these into a coherent pedagogical vision that can engage all teachers. At Stoneville, teacher autonomy is evident in the way teachers design effective strategies to maximise student results, but again these efforts are not developed into a comprehensive or consistent pedagogical vision. Professional autonomy is certainly evident at an individual level at both schools, however the full potential of professional autonomy has not been realised at either school. Neither school has invested in developing the structures and cultures that would promote collective autonomy of their teaching bodies. As Robertson (1996:35) put it, 'the idea of professionalism has taken on a new meaning consistent with neo-liberal ideology; that of the individual, rational chooser maximising their

gains within the marketplace'. Such changes lead to a significant individualisation of the profession, with teachers working in isolation from each other. This serves to weaken and depoliticise the collective professional group.

Hoyle (2008, see Wermke and Höstfält, 2014) identifies two separate aspects of teacher professionalisation, one institutional and the other service oriented:

I would [...] term the institutional component of professionalisation connoting the collective aspiration of an occupation to meet and sustain certain criteria: strong boundaries, academic credentials, a university connection, a self-governing professional body, practitioner autonomy, a code of ethics and so forth. The other I would now refer to as the service component connoting the process whereby the knowledge, skill and commitment of practitioners is continuously enhanced in the interests of clients. Although these two processes are often presented as proceeding *pari passu*, this need not necessarily occur. Their divergence has long been the focus of critics of the teaching profession.

(Hoyle, 2008: 287,288, cited in Wermke and Höstfält, 2014)

For Hoyle, the current Swedish system can be said to limit institutional autonomy whilst allowing flexibility in terms of service autonomy, depending on the characteristics of each school. The institutional autonomy of teachers and academics is limited in contexts that focus on product evaluation (meaning results in assessment). In such regimes, accountability is closely connected to the notion of efficiency, which governs relationships between teachers, central government and, more broadly, with society in general (Svensson, 2008). For Hoyle, limited institutional autonomy is evident in a model of school leadership in which school principals are confined to managerial and administrative roles, monitoring and evaluating teachers' results and managing resources needed to fulfil given goals. One example of the tensions that can flow from this, noted in Chapter 7, is that school principals in Sweden regulate funds for continuous professional development. In Chapter 7, Jill describes how the funds Parkview receives for CPD (continuous professional development) are not always employed in ways that help facilitate teachers' work and ease challenging workloads.

In the case study schools, it is clear that having school leaders who are not members of the teaching profession impacts on and disempowers teaching staff. School leaders have an important role to play in professional representation and communication at institutional level and beyond (Wermke and Höstfält, 2014), and in integrating a loose band of fragmented practitioners, which is more difficult to do as a non-teaching member of staff (Hoyle, 2008; Weick, 1976; see Wermke and Höstfält, 2014). However, at the same time, in a school led by non-teaching

managers, teachers can enjoy a large degree of 'service autonomy', by that meaning freedom to choose teaching methods, materials and content.

9.3 Workload and opportunities for decision-making

As mentioned in the previous section, teachers at both schools enjoy a high level of autonomy in the classroom and in relation to course planning. Teachers at Parkview also have some freedom over workload negotiation. However, the way extra curricula tasks and workload are allocated and organised offers little opportunity for negotiation between teaching staff and management. As noted in Chapter 7, teachers at both schools feel they are insufficiently involved in decision-making about their work outside the classroom, for example in their pastoral role as mentors and in their administrative work for the school.

In interviews, most teachers at both schools voice frustration and disappointment about the perceived increase in administrative and extracurricular tasks they are expected to undertake. These aspects of their work are often considered time-consuming, stressful, and peripheral to their core teaching responsibilities. The way in which teachers construct these extra-curricular activities varies between schools. At Parkview, staff members highlight the lack of fit between certain tasks and the professionalism and role of teachers. At Stoneville, members of staff stress the performative elements of these duties, which are regarded as another opportunity to check on teachers' productivity.

At Parkview, teachers make a clear differentiation between their pedagogical role in the classroom and the other tasks they are supposed to perform. In doing this, they differentiate between a professional role in which they feel they are in control, and another that they do not consider to be related to their professional expertise and in which they are merely required to respond to external instruction:

We are certainly going in the direction of extending our working hours, as it is not realistic to do all the documentation on top of teaching in a standard working week. Working in a small school there is tendency to move teachers into areas that are more administrative, organisational, and there I would say it's a shame as it's a waste of education. But there is not much one can do about it.
(Anna, Parkview)

The problem in general with teaching here in Sweden is that we are becoming more and more like administrators. We have responsibilities for things that we have nothing to do with, like nothing to do with pedagogy, and this is devaluing the profession. I am a mentor and I'm responsible

for 18 girls... but there is a lot of answering emails, setting up stuff, doing stuff you don't know why... and it seems like it's getting more and more.
(Peter, Parkview)

These quotes demonstrate teacher frustration and uncertainty, and the formation of new subjectivities. Bernstein's (2000:192) 'mechanisms of introjections' (which govern processes of identity construction based on knowledge and practice) are weakened or substituted by 'mechanisms of projection' (in which identity construction results from external factors). Many aspects of teachers' new workload are not considered by them to be meaningful or relevant, as for example being a personal tutor/mentor for students. This is particularly the case at Parkview, where the school's reputation rests on the high prestige of its staff, and their subject expertise and pedagogical skills.

Another issue that comes up repeatedly in teacher interviews is the perceived impossibility of having a say or influencing decisions about workload (also highlighted in Chapter 7 and 8). As noted in the previous section, teachers at Parkview operate largely independently of each other, which makes it more difficult for them to act as a collective professional body in relation to such decisions.

The teacher role has become so broad I really don't know what is the point sometimes. I think in the private schools they want teachers to take on more responsibilities that in the past the council would deal with... for example filling out students' college applications. I feel I'm becoming a surrogate nanny. I don't know how my colleagues feel about it... we don't talk that much honestly.
(Michael, Parkview)

I think the administrative tasks of teachers should be cut down, but the principals have no choice, we have to follow the school law. Working as a tutor [mentor] is something extra on top of teaching as we need to lead anti-stress programmes... but it is not my field of expertise so I don't see it as meaningful.
(Lars, Parkview)

Teachers at Parkview emphasise the impossibility of taking collective action to change the organisation of their workloads; 'school-law' and 'the private schools' dictate certain decisions that teachers feel they cannot oppose or change. In interviews, teachers never mention belonging to a professional collective; their accounts are highly individualised, as reflected in the constant use of the personal pronoun 'I'. The emergence of market-oriented teachers is evident here; teachers do not question or react to decisions made about their working routines as a group, but consider the relationship with their employer individually. This strongly individualised notion of autonomy mirrors the thrust of current policy on teacher education and the revised teacher-training curriculum implemented in 2011. According to Beach and Dovemark (2011:218), the de-emphasising in the

curriculum of the social role of the teacher and the importance of the professional body (in favour of subject specific expertise and class management) risks creating a situation in which 'teachers will be even less than they are today able to control and safeguard the development of the conditions of labour and employment in schools and other institutions in which they will carry out their professional activities'.

Teachers at Stoneville offer a different account of the extracurricular tasks they are performing. Stoneville's marketing materials give extensive space to promoting the house system and the sports clubs the school runs under the supervision of members of staff. These activities are central to school marketing efforts as they signify the 'English' nature of the school and serve to attract a student population interested in accessing an Anglo-Saxon education model. Teachers at Stoneville are deeply involved in these activities and do not tend to challenge them *per se* for not being part of their professional role, as is the case at Parkview. In fact, they seem to identify these tasks as being 'the core of the school'. Rather, their criticism is that extracurricular activities are yet another arena in which they have to exercise 'performativity', or are held accountable for their actions. This adds a new level of tension and stress to their daily routine:

As you see, we are really busy. We are running from one place to the other and if it's not delivering lessons it's to be in a meeting or the extracurricular activities we are supposed to do. A lot of pressure is put on teachers to get all this stuff done. When we meet our managers... this is important. I almost panic sometimes. (Marta, Stoneville)

We hire quite a lot of teachers from abroad. And when they come here initially they are very impressed by the number of hours we deliver per week, 16 hours, compared to the UK that's very low. But then they realise that there is so much more, events and all the other stuff that happens in the school. You hear a lot from teachers that they are expected to work harder here than in other countries, despite the fewer contact hours. And this is the core of the school. This is how we are appraised. (Stephanie, Stoneville)

Lyotard (1984) emphasises how performativity leads to 'the law of contradiction'. This involves an intensification of 'second order activities' (in this case teachers' administrative tasks and performance assessment) as a consequence of an increase of 'first order activities' (the organisation of projects and extra-curricular activities, professional development etc). Lukas's quote illustrates this very clearly:

We are very busy, we work a lot... You can't literally go anywhere without having someone needing something from you. You come back after a class to your office and you find a list of emails, each of them with a task to do which takes a minimum of half an hour. And you can't postpone them, as much depends on these emails. The workload is just crazy. In the end I don't really have time to prepare classes. (Lukas, Stoneville)

School law, the council, senior management and the private school system as a whole are all held responsible for this heavy teacher workload. Teachers, and middle management, are seen as powerless to change the situation. The individual autonomy of each teacher seems to have been won at the price of collective professional autonomy and the ability to take action as a group (Helgøy and Homme, 2007; Beach and Dovemark, 2011; Beach and Bagley, 2012). This impacts on teachers' ability to discuss, plan, and negotiate a set of common aims and goals with fellow colleagues. At both schools salary negotiations take place with each teacher individually. Common action is fragmented or even non-existent; as Michael (Parkview) puts it, 'I don't know how my colleagues feel about it... we don't talk that much honestly'.

Teachers at Stoneville (for example Stephanie, cited in Chapter 7), and the Deputy-Principal, confirm that staff turn-over is high, in comparison to other similar institutions. They suggest this is because the school attracts many international professionals who tend to move on after a short period of time, as well as because 'company policy' is rigid with respect to teacher demands:

Our teachers do not stay long, they come from all over the world, they go from country to country, so we can't keep them for long.

(Deputy-Principal, Stoneville)

Teachers' varied and heavy workload reflects the company ethos and a concern to keep costs low by increasing the number of students per class and filling teachers' contracted time with administrative tasks.

Teachers at both schools are employed performing tasks that are core to each school's identity and branding: extra-curricular activities in the case of Stoneville; and holistic education in the case of Parkview. Each school constructs teachers' identities by affiliating them with a particular ethos and challenging their traditional role. As shown above, this creates tensions and some opposition at Parkview, and stress associated with performativity at Stoneville.

The discourse of responsibility (highlighted in Chapter 2 and in Chapter 8) has important links with this discussion of teacher autonomy and workload. In interviews at Stoneville, in particular, teachers highlight a perceived lack of national guidance in relation to curriculum changes and the burden of responsibility they feel to keep up to date with new requirements.

Of course we need resources, money, computers... and of course more help from *Skolverket*. I try to print all the new policies but we have no help from them... no active help... it's not like they come here and explain.

They offer courses but they are not compulsory and you have to have the time and the money to look for them first and then go. This is frustrating.
(Fredrik, Stoneville)

I think actually also, a bit more clear guidelines from *Skolverket*... these steering documents... it is not clear what we need to do and it is up to us to make sense of them.
(Sven, Stoneville)

These quotes illustrate how teachers become 'ontologically insecure' (Ball, 2003b:230), lacking confidence in their actions, the quantity and quality of their work and their performance in relation to others. Tasks and expectations are not always clearly stated. As Shore and Wright (1999:569) note, the existence of 'volatile, slippery and opaque' policies make it difficult for teachers to make sense of the new education system. As shown above, the 'equivalent education' framework (*Skolverket*, 2003), and the discourse of responsibilisation underpinning it, allow schools autonomy to design and allocate tasks and teachers autonomy in relation to course planning and delivery. However little support is offered to staff as a collective. Teachers are allocated and approach additional administrative and pastoral tasks individually; there is little collective discussion about effectiveness. Group discussion is also absent in relation to professional vision and expertise; opportunities for group work are mostly related to assessment associated duties. This contributes in both schools to staff being constructed as isolated, 'enterprising subjects' (Rose, 1989), who are self-governing within the boundaries of their school ethos, and held individually accountable for their achievements and potential failures.

In Sweden, governance through results has become a characteristic feature of education policy during the early 2000s, culminating in the Education Act of 2010. Returning to the notion of service autonomy outlined above (Hoyle, 2008), it is clear that teaching practitioners have experienced difficulties utilising the service autonomy they acquired in the years following the Voucher Reform as a consequence of the enactment of equivalent education. This decentralising shift led to an increase in administrative tasks for teaching staff, which eventually jeopardised their newly acquired autonomy (Carlgren, 2009; Wermke and Höstfält, 2014). Decisions about resource allocation made by school principals and superintendents have affected directly the service autonomy of the teachers over the past ten years (Jarl et al., 2012; see Wermke and Höstfält, 2014).

9.4 Professional ambition

The high level of independence and autonomy that characterises the teaching role at both schools also shapes career perspectives. While the teaching role is considered by many Stoneville teachers to be a temporary one (as discussed in Chapter 7), it is considered by many Parkview teachers to be a role to be combined with others.

Teachers at both schools express a desire to focus on the courses they are teaching, or even on the subjects they are qualified to teach, rather than on work outside their area of competence (which is seen to arise because their school wants to save money or prioritises other activities):

I teach English as I'm a native speaker... but I am a History teacher...
(Michael, Parkview)

I'd like to teach more geography, which is my subject, instead of all these other things.
(Sven, Stoneville)

Despite this similarity, a clear difference emerges between the two schools in relation to career progression. As mentioned in the previous three chapters, large numbers of Parkview staff work part-time and combine teaching with academic research or positions at various prestigious cultural institutions:

This school offers me the chance to carry on my activity as a researcher at Stockholm University; this is great and the students also benefit from it. My colleagues at university have to rely on scholarships; I have financial stability and peace of mind.
(Lars, Parkview)

Lars regards school teaching as something that adds to and fits with his own academic work, whilst also offering the opportunity to achieve financial stability. This may explain why he does not consider the holistic education and pastoral role the school is trying to promote to be 'meaningful'. At Parkview, many teachers manage to combine teaching and external collaborations, and they identify in their specific academic expertise the essence of their professional role.

At Stoneville, however, teachers often express ambitions to move into managerial positions, as already outlined:

For various reasons I would be interested in having a leadership position but for personal reasons it is not practical right now, but this is definitely the next step forward.
(Claude, Stoneville)

This school gives you opportunities to grow and that's great... I don't want to stay in Sweden as it's not open-minded, I'll probably move to the States and work as a school manager.
(Alex, Stoneville)

Similar views are in fact expressed by deputy-principals at both schools, who consider leaving teaching to have been a sensible decision in the development of their careers:

I am now not teaching and yes... I don't miss it... I feel more comfortable in a leading role and there are more things to learn.

(Deputy-Principal, Stoneville)

I am happy I moved to a managerial role, teaching is something you can do for a number of years and that's it... I don't miss it at all.

(Deputy-Principal, Parkview)

The individualisation of teaching and expectations of self-management result in new and different career paths. One choice is a high degree of specialisation in a subject or area (as reflected in the new teacher education curriculum which de-emphasises the collective dimension of the profession by reducing subjects and courses such as sociology and philosophy of education in favour of deeper content specialism). The other is moving into a managerial role. In both cases, and at both schools, teaching becomes something that is considered either temporary or complementary to other activities.

According to Ball, this is part of a broader process of 'ethical retooling' (Ball, 2003b:226), through which professional judgement and development are being replaced by commercial decision-making. Professional choices are made to fit individual ambitions as well as schools' brand identities. The policy technologies of goal attainment, effectiveness, performance results, monitoring and management prevent the development of a shared ethical commitment to the role of educator. Such policies have a deep influence on teachers' identity and the construction of their professional roles, as well as on the core conception of what teaching and learning is. As Dean (1995:581, cited in Ball, 2003b) put it: they 'are not simply instruments but a frame in which questions of who we are or what we would like to become emerge'.

9.5 Conclusions

The teacher interviews reveal different constructions of professionalism, connected in large part with school ethos and branding and the cultures they shape. The individual autonomy of teachers is emphasised in both schools, in particular in relation to course planning, although this is interpreted differently at Parkview and Stoneville. However, the flexibility granted to schools by the 'equivalent education' framework, does not result in collective autonomy on the part of teaching staff.

Teachers seem to be more focused on individual career paths than on group decision-making and collective development.

Partly as a consequence, the heavy workload at both schools is perceived by teachers to be unchallengeable, and dictated by 'school law' or the 'private school system'. Teachers at neither school seem able to engage critically with possible ways to influence decision-making as a collective professional group. As indicated above, this tendency is reflected in and reinforced by the recent teacher training reform, which promotes the role of individual subject teachers as opposed to collective professional identity.

Teachers at both schools seem resigned to act within the dominant discourses of standardisation of school practice and self-responsibilisation that underpin recent policy developments. In doing so, they detach themselves from a collective professional identity that has played a historically important role in interactions between teachers and the state designed to advance the contexts and conditions of teachers' work (Lawn and Ozga, 1988).

Hoyle (2008) argues that teachers in Sweden have lost 'institutional autonomy' in a context dominated by managerial efficiency focusing on results. The analysis of teachers' conditions in the case study schools, however, shows how 'service autonomy' is compromised too in a scenario in which teachers have limited voice on workload and decision-making.

The individualisation and marketisation of teaching professionalism, which no doubt can be empowering for some, represents a move away from the idea of a common school. Together with the flexible interpretation of equivalence already discussed, these changes mark a further step in differentiating education and ending the common frame of reference for all - an idea that was at the core of Swedish education until the late 1980s.

Deliverology (Barber, 2010) dramatically transforms teaching and learning and the way education is experienced. At the core of Lyotard's position (1984:4) is an argument that in 'the post-modern condition' knowledge becomes a commodity. With this shift come not only new ways to evaluate what knowledge is, but completely new relationships between knowledge, learning and learners characterised by a 'thorough exteriorisation of knowledge'. Relationships between teachers and learners, and among learners and members of staff, are de-socialised. It is this externalisation and de-socialisation, seen in the focus on results and the absence of teacher voice in decision-making, which the teachers quoted in this

chapter are struggling with and against which they are striving to negotiate their professional identities.

A final point concerns pedagogy. Although Parkview focuses to a much greater extent than Stoneville in its marketing materials and steering documents on progressive pedagogy, it is clear that in both schools teachers are actually quite free (but also isolated) to make pedagogical choices, as neither school invests in a consistent and coherent pedagogical plan for staff. In a context in which some forms of accountability become central to the audit culture (e.g. standardised testing, and national and international league tables), this lack of focus on pedagogy is concerning. Lingard (2009) claims that research and practice-based knowledge about pedagogies needs to be central to teachers' professional identities. The strengthening of such identities in this way would enhance the capacity of schools to make a difference and also serve as an effective form of professional control.

Chapter 10

Conclusions

10.1 Introduction

This study set out to explore the ways in which equivalent education is constructed and enacted by different international upper-secondary schools in the municipality of Stockholm. It analysed two case study independent schools in order to understand how the concept of equivalent education shapes practices and professional identities in institutions with similar profiles (in terms of programmes offered and international outlook). The study situated this exploration within the broader policy context, examining the interactions between each school's specific practices and current policy trends. In particular, it focused on assessment and quality assurance (Bergh, 2011), ideas of steering by objectives and individual school responsibility (Dahlstedt, 2009), the logic of inspections (Rönnberg, 2014; Lindgren, 2015), and new teacher training programmes and teaching accreditation (Alexandersson, 2011; Beach and Dovemark, 2011). This study did not seek to evaluate the impact of each school's construction of equivalence on the education they offer, but instead to highlight the possible tensions and contradictions inherent in each model.

Recognition of context is an important methodological feature of qualitative research (Marshall and Rossman, 1995) and policy analysis (Ball 1990, 1992 and 1997; Ozga 2000; Taylor, Rizvi, Lingard and Henry, 1997). This study explored the spread and impact of neo-liberal market policies at national and municipal levels, highlighting their connection with a global policy discourse of efficiency and the knowledge economy, and revealing continuities and discontinuities across contexts. It analysed historical perspectives on equivalence, demonstrating how the concept has evolved and changed over time. Acknowledging that policies do not operate in isolation, the study also examined the relationship between equivalence, in terms of flexible management models and steering by objectives, and the recent reforms of upper-secondary education and teacher education.

The approach taken to this research enabled exploration of the degree of 'inter-textuality', or commonality and disjuncture, between policies in education and in other important areas such as housing, employment, healthcare and integration (Chapter 2). A central idea running through this thesis is that the construction, from the 1980s on, of a 'new Swedish model' (Boréus, 1994) of 'small-scale democracy'

(Englund, 2003; Dahlstedt, 2009), focused on individual freedom of choice, did not herald the arrival of completely free markets. Instead it marked the birth of a range of new kinds of public-private partnerships, and the incorporation of market mechanisms into the production and distribution of public services through 'new public management' (Lane, 2000; Jarl et al., 2012; Larsson et al., 2012). As highlighted in Chapters 2 and 4, Sweden moved from a centrally driven, social engineering model to a form of governance that placed much greater responsibility on individual citizens. Deregulation led to a new wave of re-regulation: new forms of governance took hold as traditional government interventions were withdrawn.

The key strategy in this new form of governance is 'responsibilisation' which, following Rose (1999) can be understood to mean governing in the name of freedom. This form of governance is based on the creation of self-regulating communities and individuals and simultaneously on monitoring and exercising control over them (Dahlstedt, 2009). Despite the appearance of flexibility and deregulation, then, the 'centre' maintains a key, controlling position through the monitoring of activity and collection and management of data, whilst 'localities' (in the case of education, local authorities) continue to be marginalised. So while 'the governance turn' (Ball, 2009a) appears to denote deregulation, it is actually associated with close supervision through new forms of assessment and inspection. School evaluations become a policy tool (Segerholm, 2001; Howlett et al., 2006), with data resulting from evaluations constituting a new and strong link between the centre and a continuously monitored periphery (Neave, 1988; Fägerlind and Strömqvist, 2004).

This process of re-regulation is not peculiar to Sweden. The Swedish education model is framed within an international, more specifically European, perspective dominated by top-down accountability and steering by results (Ozge and Jones, 2006). The post-Lisbon Europe has been created and organised on the basis of international comparisons and goal-setting (Grek et al. et al., 2009). These processes of benchmarking and regulation require a constant inflow of statistics and standards, in other words 'governing by numbers' (Rose, 1991). As outlined in Chapter 4, the shift to a decentralised and then a rapidly re-centralised education system in Sweden started in the early 1990s, with the introduction of the Voucher Reform and subsequently a new curriculum for schools and for teacher training, and a clear focus on freedom of choice for families and local autonomy for individual schools. As the analysis in Chapter 4 illustrates, such developments completely

transformed education policy which, by 2008, was totally centred on steering by objectives and outputs.

As mentioned above, theories of governance are concerned with the new role that the central state plays in the process of monitoring and steering by goals/objectives. The central state does not disappear, but maintains its power through new systems of control (Dale, 1999; Ball, 2009a). The discussion of new constructions of 'quality' in education in Chapter 8 is a significant example of this. Quality assurance becomes as one important tool of government, along with other financial, legal and ideological instruments (Lindensjö and Lundgren, 2000). Policy-making is no longer concerned with a political vision, but with the development and implementation of tools aimed to monitor and measure activities' outputs.

While the pre-1992 education system placed very little emphasis on formal assessment, focusing instead on a holistic model of education, the current system is firmly centred on this (Chapters 7 and 8). The 2011 Curriculum for upper-secondary schools focuses consistently on assessment and grading, while specifying at the same time that grade descriptors have to be contextualised and interpreted by teachers working within individual schools (a heavy responsibility, as the data cited in this study suggest).

Municipalities are increasingly urged to produce yearly reports of school attainment and quality, in terms of goal achievement (Håkansson, 2006:162–6; Chapter 5). *Skolverket* provides guidelines about how the information set out in reports should be collected and presented (*Skolverket*, 2006). These guidelines focus on preconditions for goal attainment, the school framework, and outcomes and evaluation of goal achievement. In 2004, *Skolverket* produced quality indicators with the purpose of supporting schools' self-evaluation (*Skolverket*, 2004a:1). These indicators originated in part from international comparisons and data collected by the Swedish Ministry of Education, in collaboration with UNESCO, the EU and the OECD (Segerholm, 2009).

At the heart of this relentless focus on outputs and standards is a belief that when some 'truths' about education have been determined, they are appropriate for all contexts and individuals. In this respect, the school improvement movement, discussed in Chapter 2, embodies a dogmatic and inflexible epistemology (Dale, 1999:13).

The risk is that a monitoring process focused on outputs prioritises only what can be unequivocally quantified. What flows from this, and was identified in the case study schools, is the creation of an 'evidence' base that fulfils particular evaluative criteria (Chapters 7, 8 and 9) while failing to reflect and challenge the social and cultural outcomes of school work or the processes through which they are or should be developed.

Reports from both Parkview and Stoneville show how a focus on social outcomes (e.g. attention to student participation in decision-making) has been replaced with a solid and consistent focus on results. Ultimately this shift seems at odds with policies of choice that were supposed to allow and encourage flexibility in terms of school ethos.

Such quality assurance mechanisms, which were designed in the policy communities outlined above, have contributed to the internationalisation of the Swedish state. Yet the role they have played has not been closely analysed. In some policy areas, Sweden seems not yet to be fully embracing the pathway promoted by international bodies and institutions (Segerholm, 2009). For example, criteria such as gender equality, equality and democracy are still used to evaluate schools and promoted in national policy documents, often sitting uncomfortably alongside performance indicators based on assessment and goal attainment. As shown in Chapters 7 and 9, the tensions that arise from this create difficulties for inspectors and frustration for schools. The way both schools responded to their respective inspection reports (2012 and 2013) is a good illustration of these complexities (see Chapters 7 and 9). The schools took on board and complied with recommendations (e.g. by setting up a student council at Stoneville, and working towards harmonisation of pedagogical approaches at Parkview). However, they did so in a way that did not challenge their ethos or identity, since this was central to their branding.

This research suggests that further policy work needs to take place in Sweden to set up a quality assurance and inspection system in which pre-reform criteria such as student participation and democracy can be celebrated, without being reduced to superficial indicators, and in which 'quality' is not constructed in a purely reductive and results-oriented way. At the same time, such systems of quality assurance should not penalise schools whose identities are in line with the founding values of

the education system but represent a departure from it (as in the case of Stoneville, where many teachers are qualified abroad and students speak English).

10.2 Research questions and the importance of policy context

My first research question, concerning how schools construct equivalence, required an examination of how national education policies are interpreted and enacted at school level.

My second and third research questions, concerning respectively the implications of conceptualisations and enactments of equivalence for teachers' professional roles and identities and for the central values of Swedish education, required an examination of both internal (school ethos and branding) and external (national goals, economic pressures, competitive local markets) drivers for identity formation at school and national level.

The history of change in institutions is typically one of conflict, negotiation, and adaption. It is rarely the technical and consensual process that organisational theorists describe (Ball, 1993). Policy change is understood and reacted to in many different ways depending on the specific context and the community in which policies are implemented. This was no exception in the case study schools. The changes introduced into schools by recent policy developments were set within and became accommodated to the micro-political context of the institutions themselves (which included politics within the staff body, as well as relationships with students and families).

Equivalence, by definition a concept allowing flexible rather than a singular interpretation (*Skolverket*, 2003 and 2006), is enacted by the two case study schools in very different ways, shaped by and in turn shaping school traditions, identities, and student populations. New policies (2010 School Act; 2011 Curriculum and 2011 Reform of teacher education) are introduced against the backdrop of existing traditions and identities. The past cannot be easily forgotten. It is not straightforwardly a question of 'out with the old, in with the new' (Ball, 1993). This process of adaption and assimilation was evident in relation to many aspects of school life explored in the case study schools. For example: in the redefined, individual autonomy of teachers at both schools; Parkview's interpretation of the teaching qualification system as an opportunity for the school to apply for extra funding; the professional aspiration of Stoneville teachers to move into managerial

positions; and the economic interests of companies owned by school board members at Parkview (Chapters 6, 7, 8 and 9). As highlighted earlier, the strategies implemented by both schools in response to inspections can also be understood in this light.

The extent of the complexity found in the case study schools creates considerable challenges in assembling a sensible and concise account of how schools have implemented equivalence and subsequent changes. To create such an account it has been obviously necessary to simplify. Using conceptual tools drawn from a critical discourse analytic approach allowed a set of regularities ('what was being said in what was said', Foucault, 1972:28), or master discourses that define schooling in the two case studies to be identified. These master discourses are: learning and assessment of learning; the 'new' roles of teachers; and the core values of education underpinning both teaching and learning.

From a Foucauldian (1977) perspective, these three discourses are what construct schools, managers, teachers and students as meaningful and recognisable entities. Policies (teaching qualification and funding regulations, grading, pedagogical traditions etc.) are best understood as power relations, practices and subjectivities that articulate accepted forms of learning and appropriate forms of teaching and behaviours.

By looking in this way at equivalent education (and related policies concerning assessment and teacher training), it is possible to identify the distinctive discursive practices that shape the cultures of Parkview and Stoneville. In the latter, for example, curriculum subjects are prioritised over cross-curricular and thematic studies, teaching is prioritised over learning and meta-cognition, discipline is prioritised over student-centeredness, and social and emotional well-being (and to some extent selection) are prioritised over inclusion.

Ozga and Lingard (2007:78) recognise that education research 'informs, enables and sustains learning' but 'it cannot, by its very nature, be reduced to totally instrumental activity'. The aim of this research was to develop a better understanding of the contextual elements that shape the enactment of the equivalence policy in a locally specific way. The data suggests that any further research on this topic also needs to take context seriously. The material, structural and relational contexts of schooling must become part of the process of policy

analysis with the intention of developing a deeper and more sound understanding of policy implementation and enactment at local level.

10.3 How do upper-secondary schools construct and enact equivalence?

Parkview and Stoneville construct their education models along very different lines, drawing on different historical traditions of equivalence. Parkview shapes its identity and practices around early interpretations of equivalence from the 1980s or before (centred on respect for students' individuality and pedagogical differentiation). Stoneville is shaped by more recent interpretations (focused on assessment and helping students to progress to prestigious higher education institutions). In adopting these different interpretations, Parkview represents what are considered to be the traditional values of Swedish education (student participation, a flexible curriculum, teacher autonomy), whilst Stoneville represents contemporary ideas of competition, results-based success, and empowerment through hard-work and personal responsibility (Bengtsson and Berglund, 2012). As suggested in Chapter 6, drawing on Basil Bernstein (2000), the two schools seem to embody the dichotomy between a competence and a performance model, with Parkview focusing on the holistic and personalised development of student competencies, and Stoneville focusing on student performance and attainment in standardised tests. These models are packaged and branded to attract different student populations: the Stockholm liberal, upper-middle class in the case of Parkview; and the mixed, second-generation immigrant population of the suburbs in the case of Stoneville.

The two schools' enactment of different conceptualisations of equivalent education is evident in pedagogical choices, the selection of teaching staff (see Chapters 6 and 9) and their levels of individual autonomy (see Chapter 9), the curriculum offered (see Chapter 6), the arrangement of premises, the existence of student-led groups, and the support offered to students with learning difficulties. Despite these differences, both schools' international approach to education is quite similar. For the most part this is limited to delivering the curriculum in English, thereby enabling students to gain advantageous positions in the international higher education market.

The flexibility outlined in the 2003 *Skolverket* report seems to have reached its ultimate expression in the two case study schools. Operating under the same national curriculum and offering the same national programmes, the two schools

offer almost entirely opposed models of education focused on different identity constructions of staff and students.

Analysis of these two schools raises concerns about the long-term effects of the equivalent model on Swedish education and Swedish life. By allowing students to be educated differently the education system has lost the common frame of reference (central to Swedish education prior to the Voucher Reform) that helps ensure all pupils are offered equal opportunities (the cornerstone of an egalitarian society). The great risk here is that the creation of a system in which students are educated so differently could result in a new form of legally sanctioned segregation where, in the name of freedom of choice, students follow different education paths that lead to radically unequal opportunities in their after-school life. A number of research studies reviewed for this thesis (e.g. Dahlstedt, 2009; Beach and Dovemark, 2011) seem to confirm the validity of such concerns.

10.3.1 Equivalence as common approach to marking

In a system managed by objectives and results, it is essential that school inspection focuses on outcomes and goal attainment. It is important that the state checks and inspects assessments made in local schools and municipalities, for the purpose of securing nationwide education equivalence.

(Government Committee terms of reference 2007:80:6, cited in Rönnberg, 2014)

This study has highlighted in the Swedish context what Scott (1995:80) has described as a shift 'from the state as a provider to the state as a regulator, establishing the conditions under which various internal markets are allowed to operate, and the state as auditor, assessing their outcomes'. In staff interviews the term equivalence is not mentioned in relation to broad interpretations of education approach and pedagogies (1994, 2011 curricula and *Skolverket*, 2003), but it is mentioned repeatedly in relation to assessment and the implementation of recent assessment policies placing greater responsibilities on individual schools and teachers.

The 2011 Curriculum describes the equivalent model of education in terms of comparable assessment and grading practices across schools, reinforcing the interpretation of equivalence as steering by objectives (already introduced in the 1994 Curriculum). However, no clear, central guidelines appear to have been given to clarify how assessment should be carried out, leaving teaching and managerial staff feeling frustrated and confused. Returning to the distinction between institutional and service autonomy introduced earlier in this study (Hoyle, 2008; see

Chapter 9), Swedish teachers seem to experience the stress and demands of constant monitoring to such an extent that their service autonomy is indeed limited (Carlgren and Klette, 2008; Wermke and Höstfält, 2014). Service autonomy is experienced as a heavy burden of responsibility on them. The lack of a detailed curriculum spelling out contents and methods of teaching leaves teachers feeling anxious and having to make difficult decisions about the best way to ensure student achievement (Carlgren and Klette, 2008; Wermke, 2011). In this scenario, assessment and national tests and benchmarks become a form of hidden curriculum.

Assessment is the central element of recent school reforms and the concept now at the heart of national education. From 2011 only those teachers qualified within the Swedish system can set grades. It is these teachers who bear the responsibility for their school's placement in annual municipal league tables. These, in turn, affect the school's popularity and intake, and therefore its budget.

As mentioned earlier in this chapter, assessment and comparisons represent a new form of governance (Nóvoa and Yariv-Mashal, 2003:427, see Grek et al., 2009).

The extensive use of league tables promotes what Bauman (1992) has described as a 'calculative rationality'. Globally this creates a 'politics of mutual accountability' through the 'international spectacle' of achievement or deficiency (Nóvoa and Yariv-Mashal, *ibid.*).

Assessment represents a challenge for school management as well. In a context in which there are continuous policy changes, high level of accountability and lack of central information and guidance (see the interview with Stoneville's Vice-Principal, Chapters 7 and 8), management decisions have to be constantly revisited (Fullan, 1982; Wallace, 1990). In the face of this ambiguity, schools and teachers are invested with the responsibility of making difficult choices, and these choices impact on the nature of education provided to students. For example, as highlighted in Chapter 8, some of the teachers at Parkview have opted to prioritise oral assessments, as written work is considered more time-consuming and difficult to mark. At Stoneville, optional national tests have been introduced even in subjects not requiring them, with a consequent impact on the curriculum delivered. This 'economic geometry' (Foucault, 1979:202) generates a system in which learning is subordinated to assessment. Assessment is eventually no longer open to challenge or change (Dore, 1997).

The data resulting from this research suggest that the focus on assessment is common to both Parkview and Stoneville's interpretation of equivalence. Beyond assessment, however, the two schools appear organised and constructed around quite different practices and values. The coexistence of maximum differentiation of pedagogy and ethos but tight control in relation to assessment is at the heart of this research. There are continuously negotiated tensions between different conceptions of the goals of education. In particular, this research has found tensions in relation to: the correct balance between the pastoral, academic, vocational and civic dimensions of teaching; the relative emphasis to be placed on discipline-centred and student-centred philosophies; the balance between subjects and projects; and the proper division of labour between the classroom teacher and support staff.

One strand of management thinking that is evident in both case study schools, (although in different forms), is 'deliverology' (Barber, 2010), an efficient combination of 'learning' and policy (Ball et al., 2012). According to this school of thought, policy is enacted by schools, staff and students through a process linking 'the aspirations of the authorities and the activities of individuals and groups' (Rose and Miller, 1992:173, cited in Ball et al., *ibid.*).

Deliverology is key to the political project that seeks to reshape education in the face of concerns about international comparison and the pressures of globalised markets (Ozge and Jones, 2006). It is historically and philosophically rooted in a discourse of performance and its consequent policies (Ball, 2003b). Olsen and Sexton (2009) describe this process as a form of 'threat rigidity'; that is a form of control and management that exerts pressure to conform to the dominant policy agenda. Schools develop routines and procedures to ensure their enactment of important policies.

10.3.2 Equivalence and new school management

Chapter 6 described how schools present themselves to their consumers. Schools are expected to achieve what Jencks (1984), writing about architecture, calls a double coding. One code represents a tradition that is slow changing, which echoes the familiar aspects of 'good' schooling, or what Metz (1989) calls 'real school' (a supposedly typical Swedish education at Parkview and a British one at Stoneville). The other code represents fast-changing society, new skills and tasks, new technologies and ideologies (see Chapters 5 and 6). In the case study schools

managers keep hold of traditions as they are important components of their school branding strategies and at the same time power ahead ideas related to managing businesses that are not connected with the traditional role of education. The coexistence of these two discourses creates confusion and tension for the teaching staff. The gap between managers (or board) and teaching staff is one way in which the case study schools seem not to deal with this contradiction, by excluding teachers from long-term goal setting (as the interviews with Stephanie, Anna, John, Michael and Lars quoted in Chapters 6, 7 and 8 suggest). However, distancing staff from decision making only appears to create further tensions and dilemmas.

Whilst at Parkview, teachers feel disconnected from the managerial running of the school, at Stoneville they reconstruct their roles by embodying a managerial approach in their focus on results and faith in top-down decision-making. This form of non-inclusive management, which has contributed to the creation of the contradiction outlined above, in terms of uncertainty and lack of involvement, is constructed as the solution to it. Interviews with Michael at Parkview and John at Stoneville are paradigmatic in this respect (see Chapters 6 and 8), as both teachers express a desire for clear instructions and specific guidelines to follow as the only solution to their current difficulties.

Estler (1988) and Duignan (1990) argue exactly this. The authors suggest that management enhances a discourse of rationality and offers an appearance of order and control in contexts that are often uncontrollable and provides a 'kind of legitimisation' by giving the appearance of logic to processes inevitably affected by vagueness (Estler, *ibid.*). The frustration generated by the new recruitment, assessment and inspection policies are good examples of the difficulties that school managers face in responding to the needs of institutions and staff in a context characterised by recurrent policy changes.

In a situation where institutional autonomy is granted, managers and executive boards would be selected from among the teaching staff and would have similar visions and interests (Hoyle, 2008; Wermke and Höstfält, 2014). This is not the case in the case study schools. Managers have come increasingly from the business world and bring with them a different culture and ideas that are rapidly changing the core values of their schools. School managers interviewed for this project were not simply concerned with managing education, but with managing education businesses by focusing on their clients' needs, and company strategies for

expansion and profit. 'New management' (Lane, 2000; Jarl et al., 2012) is modelled on the practices of business with a focus on efficiency and enterprise. In reality in the case study schools, this shift in school culture is not unproblematic (see Chapters 6, 7, 8 and 9).

As mentioned above in relation to lack of involvement of teachers in decision making, a first set of tensions relate to the friction between 'top-down' leadership, and the maintenance of commitment and interest among non-managerial staff, which is central for the success of the school. As Braverman points out: 'control is indeed the central concept of all management systems' (Braverman, 1974:68). Chapter 7 identified how the concept of consultation (Lukes, 1977, cited in Ball, 1987) captured this situation of 'non-influence' of teaching staff. New management discourse seems to challenge established ideas about collegiality and teacher professionalism. Such discourse does not seem to support and encourage enduring progress, as Alexander et al. (2005:215) have concluded: 'ironically a performance culture often lessens efficiency rather than increases it'. Mintzberg (1989:355-356, cited in Walsh, 2006) illustrates this point very effectively:

The managers at headquarters, who cannot be well informed about many diverse businesses, manage the strategic portfolio—they buy and sell businesses. It is the managers of the divisions who manage the individual businesses, where the necessary knowledge can be obtained. Unfortunately, it does not work out quite as planned. The division managers, who are supposed to be looking down to manage their own businesses, feel the gaze from above; they thus get distracted by having to glance up from time to time. There is just something about being controlled superficially, by having to satisfy someone who cannot see beyond the bottom line. To manage is to control, in one way or another. Too many levels of management has to mean too much control. Thus, the administrative arrangements promoted by two published experts in administrative systems are not better at all, not after they have squeezed the human energy and involvement out of the people through their continual pressures and rationalisations, through their obsession with controlling performance directly.

Another set of tensions concern the purposes of education and flow from the opportunities and limits entailed by equivalence. Is the purpose of education to develop rounded individuals, to form good citizens, or to provide access to higher education, thus unlocking advantageous future careers? Equivalent education leaves the decision to individual schools, where teachers need to implement one specific model. This leads to ethical dilemmas about how 'the private sector' (Anna, Parkview) can affect the core values and outcomes of education.

School managers provide a framework for goal achievement that is supposed to support teachers' work and effectiveness, but in reality it has little to do with the

teaching profession itself. If deprofessionalisation has been defined as loss of autonomy (Stenlås, 2009; Wermke and Höstfält, 2014), then this is certainly true in the case of teachers at the case study schools.

10.4 What are the implications of these constructions and enactments for teachers' professional roles and identities?

Evidence of discontent and disengagement was found in both schools; what Goffman calls 'role distancing', or 'disdainful detachment of the performer from a role he is performing' (Goffman, 1961:110). However opposition to changes in school management and the professional role of teaching staff is not manifest, except in a very fragmented way in the case of one school (Parkview). Even in Parkview however teachers do not speak out with a unified voice. In the case study schools, there was no evidence of a shared action plan. Teachers appeared to act individually, without a sense of belonging to a collective professional group.

The constant emphasis on results and efficiency is internalised by individuals, who feel responsible for the success of their institution regardless of the personal cost. In both schools teachers operate as individual units, enjoying a certain degree of autonomy (constructed in individual terms) to plan courses, but disconnected from a shared professional and collective identity. Instead, the ethos and philosophies of each school shape teacher identities, focusing either on prestige (the competence model at Parkview) or on efficiency and results (the performance model at Stoneville). In this context, staff professionalism is used as a marketing tool by the schools in order to attract preferred student populations. (This is evident in both schools, though it manifests itself differently: as traditional Swedish professionalism in the case of Parkview; and an idea of good "English" teaching at Stoneville).

Space for collective action is absent and, indeed, is not even perceived by teachers to be missing (the use of the personal pronoun "I" in interviews with Parkview's and Stoneville's staff whenever a criticism to the school was expressed can be read in this light). 'Dominant discourses are often so powerful that the dissenter finds it hard to voice dissent articulately or objectively' Gold and Evans (1998:9). According to Ball (1990:2) 'discourses constrain the possibilities of thought. They order and combine words in particular ways and exclude or displace other conditions', thereby determining what is perceived to be possible and even thinkable. At the same time,

increasing workloads, innovation overload and information deficit combine to produce high levels of stress and declining morale.

As outlined above, what is clear in the data is that in reaction to the heavy pressure placed on teachers, opportunities to reflect and raise concerns are missing.

Most studies of managerialism in public services have highlighted attempts to control and constrain professional autonomy, although evaluation evidence has not been conclusive (Exworthy and Halford, 1999; Kirkpatrick et al., 2004; see Clarke and Newman, 2009). The room for individuals to exercise autonomy is increasingly narrowed, determined by what policy makers believe support success and quality and what school leaders believe will support their school's position in the league tables.

Professionalism in the case schools appears to be diverting from 'a myth or an ideology of professionalism' (Evetts, 2003), comprising specific expertise and autonomy. In Chapter 9 this 'myth' was referred to as of institutional autonomy (Hoyle, 2008). On the contrary, the new version of professionalism enacted by the case study schools includes the promotion of organisational objectives rather than trust based on competency and license (evident in Parkview). It also implies adjusting to budget limitations and harmonisation of procedures, which consequently limit independent decisions. Finally, it involves accepting externally-set goals as well as different forms of accountability and even direct control (in the case of Stoneville).

In an environment dominated by new forms of governance, as described at the beginning of this chapter, teachers are monitored under the guise of self-regulation and motivation (Rose and Miller, 1992; Burchell et al., 1991; Dahlstedt, 2009). The managerial discourse of business and enterprise is integrated with discourses about student care, quality and innovative or high-standard pedagogy (see interviews with Anna at Parkview and Stephanie at Stoneville in Chapters 7, 8 and 9). In addition, as noted particularly at Stoneville, a discourse of competition is also present, connecting the individual work of each teacher to the general performance of the school.

Linking individual work to the idea of success or failure of the school as a 'business' also strengthens the idea of double responsibilities of teachers and amplifies the possible effects of failures. This pressure negatively affects relationships among colleagues and between teachers and managers (Ball, 1987). The discourse of

responsibilisation, highlighted in relation to other policy areas in Chapter 2, also has a clear impact on teachers' identity construction.

10.4.1 Service based identity: the teacher as assessor

It has been suggested repeatedly in this study that the collective autonomy of teachers has been considerably eroded and, in the case study schools, the space for teachers to exercise judgement and decision-making has been severely restricted by an externally-imposed framework focused on the fulfilment of national goals. This reduces teachers' voice, particularly in relation to assessment, but also in relation to institutional decision-making, their pastoral role, and in other tasks not strictly related to class work. Commenting on this trend, and drawing on experiences from the US and Australia, Loomis et al. (2008, cited in Menter, 2009) observe the 'flattening' of education through a process of standardisation of practice.

With assessment now at the heart of the education system, teachers are constructed above all else in relation to their ability to assess students rather than to educate them. In both schools, the issue of licensed teachers was central to management interviews, as these are now the only teachers able to assess and therefore the only teachers schools can employ. The focus on assessment results in a complete shift in professional role, from education to evaluation. Teachers face this change alone, as the logic of competition between schools and teachers' heavy workload leave little room for collegiate support.

In a performative discourse, ideas such as 'efficiency', in relation to assessment and the profession as a whole, are constructed as natural and neutral instead of being seen as resulting from a particular ideology (Ball, 1990:154). Once teachers are detached from the function of shaping future citizens and contributing collectively to the democratic development of society (Swedish 1969 and 1980 curricula) they are, in a sense, no longer 'servants' of the state, but of the global economy (Clarke and Newman, 2009). 'Efficiency' is constructed as a concept holding only positive qualities. Any potential negative consequence such as lack of personal initiative and mutual support among colleagues and institutions are ignored. Such a shift is sometimes accompanied by some opposition (as in the case of Parkview), but often comes to be considered 'normal', a part of what is expected within a particular institutional philosophy (as at Stoneville). Sachs (2003:127) and Robertson (2000:

209, 210, both cited in Menter, 2009) talk respectively of 'new professional identities for new times', and of five identifiable new teacher identities: teacher *bricoleur*; teacher manager; teacher entrepreneur; temporary teacher; and service teacher. As far as the Swedish case is concerned, a sixth identity can be added to the list: that of teacher as assessor.

This research suggests, then, two main consequences for teachers of reforms to upper-secondary education in Sweden: first, the loss of collective identity and erosion of teachers' influence on school life; and second, a shift in teachers' roles from educator to assessor. As the literature discussed in this section indicates, both these changes can be connected to a global shift in teacher identity, in which teachers are constructed as serving dominant economic and international discourses rather than educating future citizens.

As discussed in Chapter 5 in relation to international and multicultural curricula (Barrie, 2004; Morais and Ogden, 2011; Killick, 2012), contemporary globalised society requires an education system able to enhance students' critical skills, awareness and ethical dimensions. Teachers should play a crucial role in this, beyond the delivery of content and skills training. Boman (2006) discusses how integration of new-comers is constructed in Swedish policy as a problem that education needs to solve (see Chapter 5) and Englund (2006) talks about the importance of integrating deliberative communication into school pedagogy to help foster democratic thinking in a multicultural society. Yet these competences and the potential contribution of teachers to shape a critical and multicultural education appear to be downgraded in the current Swedish education system and in the case study schools. In order to support students developing these competences, teachers need to see themselves as part of a group that has a shared commitment to this idea of education, rather than individuals working in isolation.

These critical dimensions of teaching seem to be absent from the case study schools, which privilege, in different ways, a performative approach based either on traditional academic discourses or a focus on attainment and results.

10.5 What are the implications of schools' constructions and enactments of equivalence for the central values of Swedish education?

The shift in control over schooling from the state to the market means that being a good school is no longer enough; schools must now become successful

businesses. But this shift is not as simple or as unproblematic as it may first appear, as it involves a shift in values as well as a change in focus, as this research illustrates.

The values of Swedish equivalent schools are no longer derived from the educational *per se*. The core values of the two case study schools are in fact reconstructed as branding strategies. The two schools' founding values, which shape the way they interpret the curriculum and the idea of equivalent education, become part of a marketing discourse aimed at attracting the 'right' student population. For example, some of the traditional values of Swedish education (student participation, pedagogical differentiation and a flexible curriculum) are reshaped by Parkview as a marketing strategy designed to attract the Stockholm liberal elite. In contrast, the values of internationalisation and strict academic preparation, reflecting a supposed British tradition, are used by Stoneville to attract a multicultural student population not fully represented in the national Swedish system.

Empirical studies have conclusively shown that it is still the children from most advantaged socio-economic backgrounds who achieve and are therefore seen as 'ideal pupils' (Svensson 2001 and 2006; Dovemark, 2004; Beach and Dovemark, 2009 and 2011; Beach and Sernhede, 2011). These children's success is based on the chances they have to convert their class-cultural capital into education capital in schools more effortlessly than others are able to do so, with support from active social networks when necessary (Ball, 2003; Beach and Dovemark, 2009 and 2011). This means that even though the dynamics of school choice and learning may now be different (Böhlmark and Lindhal, 2007 and 2008; Lund, 2008) what results from these choices and from equivalence is not new (Bunar, 2008; Beach and Dovemark, 2011). Rather dynamics of choice shape practices of social reproduction that do not challenge social inequality (Darmody et al., 2008; Beach and Dovemark, 2011). The claim that giving individual choice in the educational system will allow greater autonomy must be problematised (Bunar, 2008; Beach and Sernhede, 2011; Beach and Dovemark, 2011; Dahlstedt, 2009).

Students, in this context, are positioned as both consumers of and a commodity within schools, needed to attract additional students and enhance the popularity and prestige of each institution. Parkview and Stoneville construct clear branding identities, which are portrait and disseminated through their websites, marketing materials and even yearly reports (*verksamhetsplanor*). School brands are

performed through what Gewirtz et al. (1995) called 'glossification' (1995), by that meaning the construction of an appearance specifically designed to appeal potential prospective customers. In a similar vein, Ball (2010:216) talks about fabrications, which are fictional versions of a person or institution, constructed specifically for the purpose of accountability. Everything, including the photographs in and colours of the prospectus, is carefully planned and tested to achieve market effects (Ball et al., 1997). 'It's not what we do, what we teach, what we provide, it's what we look like, some may observe cynically' (Callinan, 1994:5).

10.5.1 Education in service of the knowledge economy

By focusing on academic expertise or on forms of education that enhance the talents and development of individual students, Parkview and Stoneville seem to distance themselves from one of the founding values of pre-1992 Swedish education: school as a form of citizen apprenticeship (see Chapter 4, 1969 and 1980 curricula). Both schools, although in different ways, focus on the empowerment and development of individual students, often with reference to the supposed international elite they already or will soon belong to (see interviews with Lars at Parkview and John at Stoneville, Chapter 6). By focusing on enhancing students' opportunities of future success (in terms of acceptance at prestigious overseas University) the models of equivalent education constructed by the two case study schools do not seem to be concerned with a commitment to challenge inequality or social injustice. Lars' interview quoted in chapter 6 is exemplary of this, as 'students from the suburbs' are constructed through a deficit discourse and depicted as unable to thrive in a school based on a progressive pedagogical approach, whilst the 'freedom of choice' system resulting from the Voucher Reform is not perceived as one of the causes behind exacerbated inequality in the current education system.

One of the founding values of Swedish school - to form future democratic citizens able to demonstrate mutual solidarity (Official State Report, 1948:27:3, see Chapter 4) – seems to be neglected in an education system focusing primarily on fostering opportunities for economic success. Whilst the Porto Alegre experience, discussed in Chapter 2, shows that education can have a powerful role in tackling social injustice and improving life opportunities of those belonging to marginalised groups in society (Apple, 2006); the way the education system has evolved in Sweden over the past 20 years – a system originally based on the same principles underpinning

Porto Alegre's democratic curriculum – actually restricts the possibility of schools and teachers to engage in critical thinking about inequality (Bergh, 2011; Bunar, 2010; Sundberg, and Wahlström, 2012), or - specifically in the context of international schools – about social responsibility and a collectivist outlook (Schattle, 2008; Morais and Ogden, 2011; Rhoads and Szelényi, 2011; see Chapter 5). The idea of education as citizen apprenticeship, central to the Swedish education system, seems to be overlooked in a system increasingly governed by the logic of enterprise and success, where values are now part of branding strategies aimed at attracting a certain type of student population. A common frame of reference for all, at the core of Swedish education policy up to the early 1990s, seems to be lost in this respect.

As noted by several scholars (see Chapter 2), 'education as a social institution has been subordinated to international market goals including the language and self-conceptualisation of educators themselves' (McMurtry (1991:209)). The positions of Hatcher (2000, 2001) in this respect have been already presented in Chapter 2. Such positions are reinforced by policies produced by the European Commission and its institutions (Hatcher and Hirtt, 1999).

There is a considerable volume of data on how the least well-resourced schools have suffered in education quasi-markets (in relation to both results and income), and how better-off schools have thrived instead. Markets intensify and aggravate inequalities (Apple, 2000, 2006; Beach and Dovemark, 2011; Beach and Sernhede, 2011; Davies, 1999; Gewirtz, Ball and Bowe, 1995; Whitty, Power and Halpin, 1998; Thrupp, 1999, 2000). The point to be highlighted here is that education is not a product and should not be commercialised. This question has been long debated (McMurtry, 1991; Rikowski, 1996; Winch, 1996; Tooley, 1998; Apple, 2000, 2006). Turning education into a commodity risks losing a common platform of free development for young citizens and a dimension of egalitarian citizenship that has been at the core of Swedish policy development for decades (Englund, 1994a, 2005). The commodification of education puts at risk access to different professional and life paths and, in the long run, may generate new forms of legalised segregation.

John McMurtry's (1991) work is particularly useful to consider at this juncture. McMurtry (1991:215) identifies the basic incompatibility between the market and education, in relation to aims, approaches, means and criteria.

Freedom in the market is the enjoyment of whatever one is able to buy from others with no questions asked, and profit from whatever one is able to sell to others with no requirement to answer anyone else. Freedom in the place of education, on the other hand, is precisely the freedom to question, and to seek answers, whether it offends people's self-gratification or not. The commodification of education rules out the very critical freedom and academic rigour which education requires to be more than indoctrination,

or, we might add, skills training.

It has been highlighted in Chapter 1 and 2 how a discourse of international competitiveness and comparison has affected Swedish (and international) education policy. Travelling policies connected to the knowledge economy (Ozga and Jones, 2006) promoted a focus on skills training in the curriculum and, more broadly, on reform of upper-secondary education in Sweden (2011) that regulated national programmes and restricted access to university in order to meet the needs of employers.

It is clear from the above discussion that the concept of equivalent education, due to the flexibility it allows, is at odds with the idea of democratic education (focused on the development of critical individuals and social justice for all). The shift from equality to equivalence puts at risk the traditional egalitarian principles of Swedish society. It opens the way for a segregated education system concerned with the development of the individual, through the work of a collectively de-professionalised teaching body constructed as tutors/mentors (Chapter 9) and assessors (Chapter 8) rather than educators. Equivalence, understood as attainment of national goals, is not concerned with the creation of a democratic society. It leads to a focus on a restricted idea of quality (as accountable results, Bergh, 2011, see Chapter 8), rather than the common frame of reference that is essential to guaranteeing an egalitarian start in life for all students.

The two case study schools seem to exist in a *vacuum*, detached from the social role of schooling and focused on satisfying their school populations and maintaining their brand identities. At the same time the schools, and their teachers, are held responsible for the success and failure of their institution by new discourses of governance and self-management (which also run through a number of other previously centralised, state services). With these reforms, it seems, the central state has finally absolved itself of the responsibility of caring for all its citizens.

10.6 Conclusions

The principle of equivalence is an essential aspect of Swedish education policy. Equivalence is a flexible term, differently constructed depending on the time, context and policy intent, but in every situation positioned as beyond challenge. Efforts to achieve ever-greater equivalence in education have generated consensus among different parties, as affirmed by a Conservative MP: 'We are in complete agreement with the political opposition regarding that education equivalence needs to be improved' (*Riksdag* minutes, 2007/08:98, cited in Rönnerberg, 2014). This makes equivalence the ideal lens through which to examine the Swedish education system.

At the core of the concept of equivalence is the logic of steering by objectives. However, the data presented in this research show that tensions between a re-regulated system based on self-evaluation and a highly prescriptive, data-driven system are far from being resolved. This affects the capacity to develop a new framework of trusting relationships within and between schools, as well as between schools and *Skolverket*.

In Sweden, governments have attempted to reconstitute the relationship between the centre and local areas in part by emulating traditional forms of partnership and in part by diverging from them. In the past, local authorities were strongly linked to the democratic role of central government and were accountable to it in relation to democratic goals (this is the case for example of adult education, Johansson and Bergstedt, 2015). Reforms connected to the quasi-market, prescriptive school policies, and new requirements relating to monitoring and direct accountability have changed this. A market-model, based on extensive flexibility, and a quality control model, based partly on international ideas about quality assurance and partly on the core values of a pre-reform education tradition (Rönnerberg, 2012) has undermined the importance of local contexts and relegated the traditional role of education as community-builder. Traditional criteria for inspections, such as student participation, are re-interpreted by schools in ways that do not challenge their branding identity, and do not really engage with values of citizenship. For example, the idea that students should have a voice in school life and be offered the support they need to do so is regarded by Stoneville's management as a political construction that fails to recognise the more important achievement that their students are doing extremely well in terms of academic results. Here, the focus on national goals eclipses the

social role of the school (see the discussion of Stoneville's 2012 school inspection report in Chapter 7).

Another example of the erosion of the democratic role of education is the construction of teachers who, in the re-regulated system, have given up their institutional autonomy to have a larger degree of service autonomy (Hoyle, 2008). In the years following the Voucher Reform, this increase in service autonomy created great diversity (Wermke, 2011, 2013). It initially opened up opportunities for new pedagogies and models of schooling to emerge. However, at the same time it led to an increased focus on temporary fads and short-sighted solutions (Wermke, 2011, 2013; see Wermke and Höstfält, 2014). The variation of pedagogical and organisational models generated by service autonomy endangered school quality and the achievement of traditional goals such as equal opportunity for all (Carlgren, 2009; Wermke and Höstfält, 2014). Therefore, as explained in this thesis, state governance, through the 2010 Education Act and consequent policies, sought to force teachers to streamline their approaches within a philosophy of goal attainment, and so limited their service autonomy.

This analysis suggests a number of questions can be legitimately asked about the relationship between private education providers, mechanisms of monitoring and the outcome of education as a whole. We might reflect on the implications of profit-making in education institutions, the values transmitted by particular organisations (Ball, 2006), and the loss of a common approach to shaping future citizens. We might also reflect on the impact of professional deontology and the ethics of teaching staff, including how the increased use of financial incentives and changed career trajectories affect teachers' work.

With these changes in social and moral relations we are arguably witnessing what Sennett calls the 'corrosion of character' (Sennett, 1998, cited in Ball, 2006). Such shifts are at the core of the knowledge-economy and the commodification of knowledge (Lyotard, 1984, see Chapter 9), which links knowledge not to an emancipating discourse of social transformation but to the development of skills to be deployed in the economic marketplace. The case study schools analysed in this research point to a strong individualisation and consequent responsabilisation of public services. Individual schools work autonomously from each other within a framework of goal achievement. This framework holds them individually responsible for their output, while leaving them flexibility in relation to inputs (resources, methodology, pedagogy, institutional organisation and so on). The constantly

changing nature of modern life affects the perception of moral obligations and welfare-based ethical frameworks (Ball, 2006). Teachers no longer appear connected to their institution by a solid, long-term bond, but by the opportunity for career advancement (Stoneville) or the cultivation of alternative professional interests and identities outside the school (Parkview). The new type of workers operating in this system are 'with' and 'for' the organisation rather than 'in' it, as Wittel (2001:65, cited in Ball, *ibid.*) puts it. In Sweden, the equivalent education model is the context in which such changes are allowed to take place. It is clear from this study that these complex and important issues require much further investigation.

In order to understand the development of monitoring policies and the normative role of *Skolverket* and *Skolinspektionen*, it is important to reflect on how in Sweden publically funded and administrated education was constructed as a problem to be solved (see Chapter 2; Wahlström, 2008). It was agreed that the solution to this 'education problem' was seen to involve placing more responsibilities on individual schools and their staff, whilst central government would take on an evaluative role. If the solution is constructed in terms of fulfilling given objectives and meeting certain standards then failure is defined in not reaching these standards (Lindgren, 2015). *Skolverket* and *Skolinspektionen* do not concern themselves with how schools should reach objectives but they are involved with setting benchmarks and evaluations. This is a circular problem however. In a period when attainment in relation to knowledge objectives is acquiring increasing importance, it is crucial to discuss how knowledge itself is defined and which forms of knowledge should be taught in school. More time needs to be spent discussing what is meant by attainment of goals; that is an essential discussion for all education arenas.

The 'governance turn' (Ball, 2009a) is made possible by a continuous flow of data (Rosenau, 1999). However, whilst most research attention has focused on the differences between networked and horizontal forms of governance in contrast to traditional bureaucracy (Grek et al. et al., 2009), this aspect of the 'turn', particularly in relation to inspection, assessment and the role of professionals, has been overlooked. Further research is badly needed in this area.

Finally, there are significant opportunities for different types of research into how policies of choice have been enacted by schools and municipalities in Sweden. Comparative research, ethnographic research and policy studies, for example, could offer much to these debates. If equality and the formation of a critical and

active citizenship remain important goals of Swedish education policy, it is clear that the tensions between market-oriented policies, leading to differentiated education models, and centrally prescribed notions of 'quality', as accountable results, need to be resolved. This will require additional policy work as well as further state support for schools and school-work through direct intervention.

Appendix 1 – Email to school principals

Dear

I am a Mphil/Phd student of Education Policy at King's College London and I am carrying out a project on school values and curriculum delivery in the Swedish upper-secondary school system. I am writing to ask if it would be possible to visit your school and meet and interview some members of staff as part of my data collection process. My research focuses on upper-secondary schools in the Stockholm area and your contribution would be highly valuable.

I have prepared an information sheet containing the aim of the study and what is involved in it for potential participants, and I have attached a copy for you to read. I intend to investigate how teachers and education professional implement aims and values of the school and the Swedish curriculum in their practices. In order to do that I would like to interview between 8 to 12 staff members from name of the school. Ideally, I would like to begin my data collection in August/September 2012 but I am very happy to discuss this further with you and to agree on dates for my visits which interfere as little as possible with the regular school routine.

The research is completely self-funded and it would not involve any expense for the school. As explained in the attached document, confidentiality and anonymity will be guaranteed. Upon request, all participants will be given a copy of the final report and they will have the right to withdraw from the study.

I would anticipate that individual interviews would take no more than one hour, and that they can be carried out either outside the school in non-working hours, or in a quiet place on your premises. I will endeavour to keep the disruption to your working day to an absolute minimum.

I hope that you find the attached project of interest and will be interested in working with me on it. Please feel free to contact me if you have any queries. Alternatively, you may wish to contact my supervisor, Professor Sharon Gewirtz (+4420 7848 3138 - sharon.gewirtz@kcl.ac.uk), if you would like a reference or other information. Many thanks for taking the time to read this and I hope to hear from you soon.

Silvia Colaiacomo
silvia.colaiacomo@kcl.ac.uk
Telephone: +4478 54469027

Appendix 2 – Information sheet for school staff

INFORMATION SHEET FOR PARTICIPANTS

YOU WILL BE GIVEN A COPY OF THIS INFORMATION SHEET

Equivalence in the Swedish education system: An investigation of 'equivalent education' and its impact on schooling and teachers' identity in upper-secondary education

I would like to invite you to participate in this postgraduate research project. You should only participate if you want to; choosing not to take part will not disadvantage you in any way. Before you decide whether you want to take part, it is important for you to understand why the research is being done and what your participation will involve. Please take time to read the following information carefully and discuss it with others if you wish. Ask me if there is anything that is not clear or if you would like more information.

Aims of research:

This research aims to explore how the founding values of the Swedish curriculum are interpreted and implemented in different schools. I hope the research will help other people (such as school staff, managers, policy makers) understand the changes Swedish schools are going through and their impact on teaching and learning.

Who can take part?

Anyone who works in the school as a teacher, pastoral mentor, nurse or manager.

What will happen if you agree to take part:

I will visit your school between November 2012 and April 2014. During every visit I will observe some of the activities of your school routine: such as meals, staff meetings, informal gathering in the staff room, and I will take some notes while observing. At the beginning of each visit, I will ask for permission from you and your colleagues I am intending to observe and I will leave the room while you discuss whether I can participate. If there is any ambiguity about whether I have permission from a particular individual in an observation session, I will double check that they are happy for me to use observation data before including it in my data set. I would also like to interview you. I will interview you about your professional role and your views on school, teaching and learning. We will agree the time, date and location of the interview in advance. The interview will be informal and you won't have to do any specific preparation for it. The interview will last about one hour and it will be held wherever is convenient and comfortable for you (e.g. school premises/ a local cafe). If you agree, the interview will be recorded on a voice recorder. If you agree to take part in this study, you will be able to withdraw your participation by 30th April 2014.

Anonymity and confidentiality:

Your name will be changed in the research writing to maintain anonymity. I will blank out or change any other names you use (colleagues, students, locations, etc). My notes will be password protected and kept on a secure computer. These may be seen by others involved in my research (e.g. my supervisor) but real names and identifying details will not be attached to them. Documents with real names (such as my contact list) will be stored on a separate document, also password protected.

Limits to confidentiality:

During my school visits, if you disclose anything that involves danger to a child or vulnerable adult I may need to pass it on to someone. If this arises I will discuss it with you so we can decide together what to do.

Risks and benefits

There are no specific risks associated with this study. You will receive a copy of the report, if you would like one. Please do not hesitate to contact me for any further information or concerns you would like to discuss

Silvia Colaiacomo

silvia.colaiacomo@kcl.ac.uk

Telephone: +4478 54469027

It is up to you to decide whether to take part or not. After you decide to take part you are free to withdraw at any time, without giving a reason, by 30th of April 2014.

If this study has harmed you in any way you can contact my supervisor at King's College London for further advice and information:

Professor Sharon Gewirtz

sharon.gewirtz@kcl.ac.uk

Telephone: 020 7848 3138

Appendix 3 - Interview outline for teachers and school managers

- Can you tell me about your experience as a teacher/principal in this school?

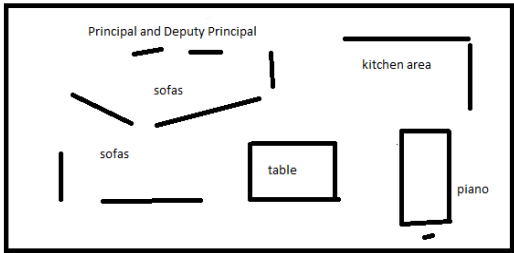
Follow-up questions will arise from the answers given, and may relate to the following topics:

- School mission, founding values / how are they implemented in school work
- Motivation / reason to work in that particular school
- Aims and values of good education
- Decision making/relationship with management/board and other members of staff
- Student population/homogeneity or variety/ reason to choose that particular school
- Relationship with student
- Parental and student involvement in decision making
- Teaching differentiation/strengths and area of improvements of the school concerning students' development.
- Changes of the interviewee's professional role over time
- Identity and professionalism/ feeling valued as a professional
- Creativity / flexibility / variety. Freedom to take initiative
- Changes, policy
- Importance of grades/result. Work related challenges and pressure
- Monitoring work
- Possible improvements / factors that might contribute to improving the interviewee's work
- Values and aims of the school and the Swedish curriculum.
- Equivalent education. Interpretation and connection with school values, aims and policy

Appendix 4 – Informants

Parkview	Role	Number of interviews	Stoneville	Role	Number of interviews
Kristin	Deputy-Principal	2	Ingrid	Ex Principal	1
Lena	Nurse	1	Chris	Ex Deputy-Principal	1
Anna	History and Civics teacher. Ex Deputy-Principal	2	Daniel	Deputy-Principal	1
Michael	History and English teacher	3	Alex	Wellbeing team. Assistant PE teacher	3
Peter	Swedish junior teacher	1	Claude	Modern foreign languages teacher	2
Lars	Swedish and philosophy teacher	3	Fredrick	Natural sciences teacher	1
Jill	Maths teacher and project coordinator	1	Lukas	English junior teacher	1
Olle	Administrator	1	Maria	Religion and English teacher. Union representative	2
			John	Art and PE teacher	3
			Marta	Maths junior teacher	1
			Stephanie	English teacher and International Baccalaureate Coordinator	1
			Sven	Geography and civics teacher	1

Appendix 5 – Sample of field notes analysis

<p>Stoneville, 7/10/2013</p> <p>Staff briefing – staffroom - 8:00 am - nr of participants: 29</p> <p>+ me</p> <p>Principal and Deputy-Principal are standing facing the staff</p> <p>9 teachers are sitting in the front row of sofas</p> <p>7 teachers are sitting in the second row of sofas</p> <p>The school counsellor and the SEN teacher are seating at the piano</p> <p>3 teachers + I are standing next to the kitchen area</p> <p>5 teachers and the school nurse are sitting around the table</p>  <p>Main speakers:</p> <p>School principal, who has recently joined the school. Recruited with an international selection process. No Swedish speaker. Background in education management.</p> <p>Science teacher, the youngest teacher of the school. He has been working in the school for less than one year. No Swedish speaker.</p> <p>Counsellor, he has been working for the school for the past 3 years. Mixed background Swedish-American, bilingual.</p> <p>All present members of staff have a note pad and a pen with the exception of two teachers seating on the smallest sofa on the first raw holding tablets.</p> <p>Teachers are dressed casually, wearing socks or slippers; the majority of teachers are drinking coffee/tea from the kitchen. The Principal and Deputy-Principal are dressed formally, suits both of them, and wearing leather shoes.</p>	<p>Is this the regular room setting for all meetings? What about subject or mentor meetings?</p> <p>The setting is frontal. It does not encourage discussion. The room is very big. This makes it difficult to hear people sitting on the other side of the room. Can they hear well?</p> <p>This event is called meeting, but it looks like a short briefing. Very limited interaction.</p> <p>Dress code – clear division of roles.</p>
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<p>The principal welcomes the staff briefly (<i>morning everyone</i>) and mentions that the meeting will be short as there are only two points on the agenda. She has the agenda on a piece of paper, not the rest of the staff.</p> <p>The first point concerns the organization of an away day with students (the Friday before half term starts). Students will be under the responsibility of the house heads (names of staff mentioned) with the support of other selected members of staff (names mentioned). No information is given about the selection of the support staff. The Principal suggests <i>that all staff participate, the canteen will be shut on the day</i> so staff that will decide not to join the day out and that will stay in the school will have to pay for their food.</p> <p>Staff are attentive and some scribbles some notes. Some exchange glances (second row of sofas). The three teachers in the kitchen area giggle at the news of the lunch. Staff on the first row of sofa nod their head.</p> <p>The Principal asks the Science teacher (by name) to give some more information on the booking system for the away day. The teacher, sitting on the sofa just facing the Principal, remains seated so he gives his back to the back of the room/majority of staff. He does not turn and face the staff while talking to them.</p> <p>The teacher explains that he set up a booking system on the intranet pages, that teachers can see 4 different locations for the away day, one per house, and number of students per house. Teachers are suggested considering spreading evenly across locations when they choose their locations.</p> <p>The Principal thanks the teacher and says she needs to move to the second point. She mentions that staff can get in touch with the science teacher if they have further questions. The second point concerns informing the staff about one female student who asked to be called by teachers and peers with a male name. The majority of staff appears confused and some comment that they did not know anything about this student. The Principal explains that the wellbeing team has been approached by the student and that the decision has been made to accept her request and inform all students about it.</p> <p>Some teachers in the second row of sofas, at the table and in the kitchen areas whisper words I cannot grasp to each other. The Principal asks the counsellor if he has met the student. He replies that he meets the student regularly and that the following week he will pass from class to class to inform students about the male name to</p>	<p>Staff seem to have limited access to information. The agenda is not distributed and apparently hasn't been distributed prior the meeting.</p> <p>Not clear if the members of staff are self-selected or if they have been selected.</p> <p>Are members of staff really free to choose not to join the day out?</p> <p>Staff are not included in the decision making.</p> <p>Limited participation. Lack of engagement. Lack of acknowledgment of members of staff. Communication seems to be between the teacher and the principal, although it should be between the teacher and the rest of the staff.</p> <p>Not involving each individual member of staff in the decision. Staff are informed about what to do, not engaged in the planning. Their input is never asked for.</p> <p>Clear division of roles, responsibilities and tasks.</p> <p>No deviation from strict scheduling.</p> <p>Lack of information. Disclosure of sensitive topic with no prior preparation of the staff on the topic. Lack of involvement in decision making process. No establishment of any sort of team-work to help teachers deal with the case (e.g. pastoral work with students etc.)</p> <p>Information is delivered centrally but not filtered or</p>
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<p>use to address this student.</p> <p>One teacher sitting at the table raises her hand to speak. The principal invites her to talk. This teacher says that exposing this student to the whole school could be counterproductive. Other teachers nod and support verbally this opinion (yes, sure, exactly, <i>självklart</i> [of course]). The Principal raises her right hand to attract everybody's attention and says that the decision has been made, so the counsellor will go around each class the following week and this is in the interest of the student.</p> <p>The majority of teachers write some notes on their notepads and nod. The Principal calls thanks everybody for attending (<i>now back to business</i>).</p> <p>Finish time: 8:27</p>	<p>mediated by the work of teachers (teacher-mentors).</p> <p>Participation is strictly regulated. Limited involvement in decision making. Clear division of roles and tasks. No room for team work on pastoral issues.</p> <p>Lack of articulate comments. Lack of collective reaction.</p> <p>More information/observations from the wellbeing team are needed. Not clear how they work or how student can seek for support.</p> <p>Lack of engagement and discussion.</p> <p>More information/observations of the decision making process are needed. What happens in subject meetings?</p> <p>Lack of information to support the decision. Why so?</p> <p>Decision-making rationale? decisions made by management seem to be implemented without critical engagement.</p> <p>Strict scheduling – hierarchy of activities</p>
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Appendix 6 – Sample of interview Analysis - (extract from interview to Stoneville’s teacher)

Line	Transcript	Coding	
1	I don't want to feel competitive... as the human mind is	Expressing inadequacy	Use of subject pronoun "I" to express feelings of frustration and opinions. Opinions are constructed as belonging to the individual, not to teachers as a professional category. "I think" same as above
2	full of angles and interpretations... I cannot say my work	Making comparisons	
3	is better than yours. I think the curriculum suffers from	Criticising the curriculum	
4	the lack of clarity. The curriculum doesn't have to	Considering alternatives Needing guidelines	Use of verbs in the active form: the curriculum "exerciss power" over teachers.
5	become a checklist but I feel that without any indication	Expressing risks, concerns and difficulties	Use of verb in the passive form. "The teacher" is an impersonal subject is constructed as a "victim", the teacher has no agency.
6	of content the teacher is very much exposed. I think the		
7	teacher gets too much freedom to carry and then		
8	becomes vulnerable... and then you switch into a panic	Expressing negative feelings about work	Three different subjects I; the teacher; you. Use of "the teacher" as a neutral subject to express general statements and situations that cannot be changed.
9	mode about what you should feel your lessons with...		Use of "you" as general person to validate the example.
10	and you struggle to create context. To teach in this	Expressing inadequacy	"I" to express opinion. "to teach" verbal noun to validate a generalised statement.
11	system is extremely hard because the teacher doesn't	Addressing the situation, specifying the problem	Again alternation of subjects. "the teacher" is used for statements; "we" is used to address a situation which cannot be changed (like "I").
12	know everything... and of course he doesn't have to...		
13	but we are in a situation with so many resources and	Expressing conflicting inputs	
14	information. So we need to understand and teach that		

15	we need only some information to process it and get to xyz and then conclusions. But I feel that the curriculum doesn't give us that sense of conclusion.	Developing strategies to cope	Subject pronoun "I". Opinions are individualised, not collective. Again use of an active verb associated to the curriculum.
16		Criticising the curriculum	
17			

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